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ABSTRACT

As one of a series of curriculum guides for office education programs in Texas, this guide contains units of instruction to assist in teaching the following objectives rated as necessary for the success of the program by experienced teachers across the state: (1) the essential elements common to all vocational programs and (2) the essential elements of office education. The four units in the vocational core cover the following topics: leadership, entrepreneurship, successful employment, and employment opportunities. Each unit contains these basic components: unit outline, resource list, performance chart, notes to the instructor, unit overview, transparency masters, activity sheets, tests, and answers to the activities and tests. Each unit is planned to cover more than one lesson or period of instruction. Each unit in the office education core is correlated to the essential elements and includes these components: unit outline, resource list, performance chart, notes to the instructor, and unit overview. The 17 units in this section cover the following topics: safety, telephone techniques, office careers, business ethics, human relations, personal development, organizing work, resources and references, business forms, business reports, language usage, written communications, business mathematics, banking activities, recordkeeping, business machines, and word/data processing terminology. (KC)

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OFFICE EDUCATION CURRICULUM GUIDE SERIES

Prepared by

Carol Sullivan

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Secondary and Higher Education
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PREFACE

The Office Education Curriculum Guide series was prepared to provide quality instructional materials for Office Education courses in Texas. The Occupational Curriculum Laboratory is currently developing and disseminating competency-based materials under contract with the Texas Education Agency for both secondary and postsecondary programs. All publications and instructional materials are developed by curriculum specialists who are experienced instructors and are validated for technical content by business and industry and field-tested by teachers and students across the state.

Curriculum guides in this series are designed for four courses: Data Processing, Office Duplication Practices, Secretarial and Office Administration, and Word Processing. These guides serve as an excellent basis for achieving the Office Education essential elements mandated by the Texas Education Agency. The purpose of developing these curriculum guides is to provide the instructors with a comprehensive curriculum guide that furnishes both a brief unit outline, correlated to the essential elements, that is scoped and sequenced, and which furnishes a structure from which to prepare lesson plans. A performance chart is provided for recording students' mastery or non-mastery of the essential elements. Suggestions and comments about these curriculum guides are requested.

hung 200

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Special appreciation is extended to Donna Lea Hines and Velma Garza, student assistants, for their hard work and their dedication to this project.

Carol Sullivan
Curriculum Specialist
Office Education

INTRODUCTION

This guide is one of our curriculum guides developed for Office Education programs in Texas. In addition, instructional guides in Office Education core curriculum are available, as well as competency profiles in folder format developed to assist in recording individual student progress toward the accomplishment of program competencies.

The guides are formatted in units of instruction to assist in the mastery of the following objectives rated as necessary for the success of the program by experienced teachers across the state: (1) the essential elements common to all vocational programs, (2) the essential elements for Office Education, and (3) the essential elements for each course, including Data Processing, Office Duplication Practices, Secretarial and Office Administration, and Word Processing. Because the guides were written in this manner, uniformity in classroom instruction and program accountability across the state may be verified.

Because each student learns differently, and because each program should meet the needs of its local population, this guide was developed with flexibility, allowing the instructor to teach basic skills in a variety of methods. Although the guides are scoped and sequenced, many units can be incorporated into rotation schedules and individualized. Each instructor is encouraged to modify, add, or delete information as necessary to meet the individual needs of each student and the needs of the local program. An appendix is included with scope and sequence examples and rotation schedule examples.

It is suggested that the instructor wishing to use this curriculum guide first read the "Use of Instructional Units" before beginning any instruction. The "Notes to the Instructor" contained in each unit of instruction should also be read carefully so that additional supplies and outside resources needed for completion of the unit can be secured.

Although many of the activities suggested in these guides could be completed without the use of outside resources, in order to assist the students in gaining realistic experience in office occupations, it is suggested that the Office Education instructor utilize some of the resources listed in each instructional unit.

USE OF THE INSTRUCTIONAL UNITS

INSTRUCTIONAL UNITS

Each instructional unit for essential elements common to all vocational programs includes the following basic components: unit outline, resource list, performance chart, notes to the instructor, unit overview, transparency masters, activity sheets, tests, and answers to the activities and tests. Each unit is planned to cover more than one lesson or period of instruction.

Each unit is the Office Education core is correlated to the essential elements. These units include the following components:

A. Unit Outline--provides the unit objective, specific objectives, suggested teacher and student activities, estimated completion time, and evaluation method

B. Resource List--provides suggested supplementary materials available to use for additional information and activities

C. Performance Chart--provides a means of evaluation of mastery or non-mastery of each specific objective and essential element

D. Notes to the Instructor--provides information on teaching sequence for the information and activities, suggested amount of material to be covered in each class period, and other teaching technique suggestions

E. Unit Overview--provides unit information in condensed form and may be duplicated for student use during study of the unit. This section is not designed to give comprehensive information on the unit and should be supplemented by other materials and lectures by the instructor

UNIT OUTLINE

Each unit outline is designed to serve as a tool to facilitate preparation of lesson plans and to serve as a basic curriculum outline for each essential element.

Each unit of instruction is based on performance objectives. These objectives state the goals of the program, thus providing a sense of direction and accomplishment for the student.

Performance objectives are stated in two forms: unit objectives, which state the terminal performance expected of the student upon completion of the unit, and specific objectives, which are those performances that will help the student to master the unit objective.

Since the objectives of the unit provide direction for the learning process, it is important for the teacher and students to discuss the objectives prior to covering the information in the unit. This discussion will provide a common understanding between teacher and student of the intent of the objectives. Performance terms have been used in all objectives of the units to assist in promoting the effectiveness among all individuals using the materials.

Instructors should feel free to delete or add objectives to tailor the material to the needs of the students and the program. When objectives are added, corresponding information sheets, activities, and tests should be designed and constructed.

Teacher and student activities are designed as suggestions only and space is given to add activities tailored to meet the individual and local needs of each program.

Estimated completion time is designed for individualization for one hour and two hour courses and at the discretion of the instructor.

PERFORMANCE CHART

The performance chart is developed to assist the instructor in recording individual student progress toward the accomplishment of the unit competencies and in recording the mastery of each essential element and specific objective. Space has been provided for additional activities and individualized and reteach activities.

NOTES TO THE INSTRUCTOR

Each unit provides a "Notes to the Instructor" section outlining steps to follow in accomplishing specific objectives. The instructor should carefully preview this section prior to any lesson, making additional notes that would assist in conveying the information to the students.

In addition, the instructor should select, sequence, or modify any information and activities deemed necessary for the local teaching situation. Arrangements should be made and supplies should be assembled as required for any activities selected. Instructors are strongly encouraged to use any additional instructional activities, methods, and references that would aid in accomplishing the objectives.

UNIT OVERVIEW

The unit overview is an attempt to condense available information to provide content essential for meeting cognitive (knowledge) objectives of the unit. Information may be presented in several ways: (1) The instructor may use the information sheet as a guide for presenting the background knowledge necessary for the students to complete the specific objectives and, ultimately, the unit objective, or (2) students may be allowed to read the unit overview sheets before or as information is discussed in class. Students should take notes on any additional information presented.

TRANSPARENCY MASTERS

Transparency masters present information in a special way. The student may see as well as hear the material being presented, thus reinforcing the learning process. Transparencies may present new information, stimulate discussion, or reinforce information presented in the information sheets. They are also very effective when identification is necessary.

Transparencies should be made from the masters and placed in the teacher's notebook where they will be readily available for use. Transparencies will direct attention of the class to the topic of discussion as well as generate other thoughts for discussion.

ACTIVITY SHEETS

Activity sheets are provided for the vocational core units only. It is suggested that the instructor refer to activity sheets in the OCL Office Education Core Instructional Guides referenced in each unit.

Activity sheets provide direction to study and also provide application and reinforcement of cognitive materials presented. An effort has been made to incorporate the following elements of the learning process: translation, interpretation, application, analysis, synthesis, and evaluation so that the learning style of each student will be recognized.

The activity sheets may be given to the students for completion in class or may be used as homework assignments. Answer sheets are provided which may be used by the teacher and/or student in checking student progress.

The instructor should preview the activity and "Notes to the Instructor" sheets prior to making student assignments to assure that information has been covered and all supplies required are available. Class time should be set aside for those that require group participation. Those activities that require student participation rather than written answers should be evaluated to the satisfaction of the instructor.

TEST

Written tests are provided for the vocational core units only. It is suggested that the instructor refer to the unit tests in the OCL Office Education Core Instructional Guides referenced in each unit.

These tests are provided to measure students' understanding of the information covered in each information sheet. Individual test items may be used as a pre-test measure or as a review oral quiz to assist the teacher in spotting difficulties being encountered by students in their efforts to accomplish the unit objective. The individual tests over the information may also be grouped as a semester or unit test. The instructor should construct additional test items for any objectives and information added to the unit.

VOCATIONAL CORE

LEADERSHIP

75.81(a)(1) Leadership concepts and skills. The students shall be provided opportunities to:

(A) Identify characteristics and responsibilities of leaders and effective group members;

(B) Participate in orderly meetings conducted according to parliamentary procedure;

(C) Function effectively on committees;

(D) Plan and conduct leadership activities; and

(E) Prepare for effective citizenship and participation in our society.

LEADERSHIP

UNIT OBJECTIVE

The student will be able to explain the meaning of leadership, identify characteristics and responsibilities of leaders and effective group members, participate in orderly meetings conducted by parliamentary procedure, function effectively on committees, plan and conduct leadership activities, and prepare for effective citizenship.

SPECIFIC OBJECTIVES

1. Explain the meaning of leadership.
2. List advantages and disadvantages of becoming a leader.
3. Select good leadership styles.
4. Name three leadership styles.
5. Explain the purpose of the Office Education Association.
6. Write the OEA pledge.
7. Describe the essentials of a good meeting.
8. Participate in an OEA meeting conducted according to parliamentary procedure.
9. Explain the function and purpose of committees.
10. Describe how leadership pertains to effective citizenship.

TEACHER ACTIVITIES

1. Preview the unit.
2. Prepare bulletin board about leadership.
3. Review and discuss objectives with students.
4. Discuss unit overview with students and show transparencies during discussion.
5. Explain the purposes of OEA.
6. Show film on parliamentary procedure.
7. Instruct students as they participate in a work club meeting.

STUDENT ACTIVITIES

1. Discuss objectives and unit overview.
2. Ask questions about leadership qualities and styles.
3. Complete Activity Sheets 1 - 4.
4. Discuss purposes of OEA.
5. Complete Activity Sheets 5 and 6.
6. Participate in an OEA meeting.
7. Participate on a committee.

EVALUATION -Unit Test

ESTIMATED COMPLETION TIME – 3-6 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section

RESOURCES

HELPS IN MASTERING PARLIAMENTARY PROCEDURE
booklet
Ohio State University
Instructional Materials Laboratory

LEADERSHIP DEVELOPMENT
text/workbook
Gregg/McGraw-Hill

OCCUPATIONAL SURVIVAL--LEADERSHIP
Division of Business Education
Department of Vocational and Technical Education
University of Illinois
Urbana, IL

OEA LOCAL CHAPTER OFFICERS' HANDBOOK
Occupational Curriculum Laboratory
East Texas State University
Commerce, Texas

PARLIAMENTARY PROCEDURE LESSON PLANS
Instructional Materials Laboratory
Ohio State University

PARLIAMENTARY PROCEDURE RESOURCE MATERIALS
Instructional Materials Lab
University of Missouri

PARLIAMENTARY PROCEDURE RESOURCE MATERIALS
transparencies, slides, student manual, instructor's guide
Career Aids, Inc.

PERSONAL DEVELOPMENT FOR COOPERATIVE PART-TIME TRAINING
Occupational Curriculum Laboratory
East Texas State University
Commerce, Texas

SAFARI, A COMPREHENSIVE CAREER GUIDANCE PROGRAM FOR SECONDARY, COMMUNITY COLLEGE AND UNIVERSITY LEVELS
San Bernardino County Schools Office

COMMUNICATE
Wadsworth Publishing
Belmont, CA

PERFORMANCE CHART

75.81(a)(1)

OBJECTIVE: The student will be able to explain the meaning of leadership, identify characteristics and responsibilities of leaders and effective group members, participate in orderly meetings conducted by parliamentary procedure, function effectively on committees, plan and conduct leadership activities, and prepare for effective citizenship.

	MASTERY	NON MASTERY
1. ACTIVITY SHEET 1--UNSCRAMBLING TERMS		
2. ACTIVITY SHEET 2--DO YOU HAVE WHAT IT TAKES?		
3. ACTIVITY SHEET 3--WHAT'S YOUR STYLE?		
4. ACTIVITY SHEET 4--IDENTIFYING LEADERS		
5. ACTIVITY SHEET 5--LEADERSHIP QUALITIES		
6. ACTIVITY SHEET 6--OEA PLEDGE AND EMBLEM		
7. ACTIVITY SHEET 7--CONDUCTING BUSINESS		
UNIT TEST		

I. PREPARATION FOR THE UNIT

A. Preview the unit. To utilize this curriculum in the most effective way, you should review each unit of instruction and localize and individualize the material in your own program.

B. Prepare a bulletin board about leadership.

II. OBJECTIVE SHEET

A. Review all objectives and then add or delete to meet local program needs.

B. Review and discuss with the students each specific objective as it relates to the program.

III. INFORMATION AND ACTIVITY SHEETS

A. INFORMATION SHEET 1--WHAT IS LEADERSHIP?

1. Explain the terms and definitions to the students.
2. Discuss leadership and the advantages of being a leader.
3. Explain how everyone can be a leader.
4. Relate how each student should work toward the qualities needed to be a good leader.
5. Discuss the leadership styles.
6. Discuss the importance of selecting good leaders for OEA.
7. Do ACTIVITY SHEETS 1 - 4.

B. OEA Information Sheets

1. Display pictures, banners, and other items that might explain the organization.
2. Have the students who have participated in OEA during the previous year explain the organization's activities.
3. Explain the purposes of OEA.
4. Discuss the meaning of the OEA pledge.
5. Have students memorize the OEA pledge.
6. Provide students with the OEA Local Chapter Officers' Handbook for complete lists of officer duties.
7. Have students decide which offices they would like to hold.
8. Have a practice club meeting using parliamentary procedure.
9. Divide the class into committees and let them plan the year's activities for that committee.

IV. TRANSPARENCY MASTERS

(NOTE: Transparency Masters are included as Information Sheets.)

A. TM-1--WAYS TO SHOW LEADERSHIP ABILITY

B. TM-2--QUALITIES OF A GOOD LEADER

C. TM-3--CHOOSING A LEADERSHIP STYLE

V. EVALUATION

The Unit Test covers Unit Overview only. Questions may be added for the OEA-related material that you use in this unit.

VI. ANSWERS TO THE TEST

A. Answers are based on the total information covered in the unit.

B. For convenience of grading, make corresponding answer sheets for additional test parts added.

I. TERMS AND DEFINITIONS

A. Autocratic--having complete power over others

B. Confidence--strong belief or trust in someone or something else

C. Democratic--all of the people involved in helping to make a decision

D. Enthusiastic--full of interest

E. Loyalty--the condition of being faithful

F. Maturity--the condition of being fully developed

G. Optimistic--the belief that there is more good than bad in life

H. Personality--the special qualities which make one different from others

I. Potential--the ability that may be developed

J. Self-confidence--the strong belief and trust in oneself

II. LEADERSHIP DEFINED

A. Leadership is the ability to develop confidence and loyalty in others, cause them to follow willingly, and to lead in a responsible way.

B. A leader may not always be the one who is given the authority or advantage.

III. REASONS FOR BECOMING A LEADER

(NOTE: Leadership is something that can be applied to many areas of your life.)

A. To gain self-confidence

B. To learn to meet new demands

C. To gain maturity

D. To learn to listen to and respect the opinion of others

E. To reach goals faster

IV. DISADVANTAGES OF BECOMING A LEADER

A. Must be willing to work harder than anyone else

B. Must be well informed

C. Must be able to abide by a decision even though the majority may disagree with you

D. Must remain enthusiastic and optimistic even though you may not be

V. HOW TO BECOME A LEADER

A. Become a good follower.

(NOTE: Follow examples of good leaders and learn from their mistakes.)

B. Learn your strong points and your weak points.

(NOTE: Turn your weaknesses into strengths.)

C. Study the qualities that make a good leader.

D. Plan to work toward becoming a leader.

(NOTE: Realize the leaders are made, not born, into leadership.)

E. Participate in the leadership training provided in the Vocational Office Career Clubs of Texas.

VI. WAYS TO SHOW LEADERSHIP ABILIT

A. Be willing to assume responsibility.

B. Take pride in doing a good job.

C. Be a good listener.

D. Be fair.

E. Know that your responsibility is to let others share responsibilities with you.

F. Use the talents of each person in the group or organization to the fullest potential.

VII. HOW LEADERS ARE CHOSEN

A. Some leaders are chosen because of whom they know.

EXAMPLE: An individual heads a committee because he/she is a friend of the boss.

B. Some get positions because of who they are.

C. Good leaders are chosen by:

  1. Their ability
  2. Their experience
  3. How they deal with people
  4. Their knowlege of leadership steps and how to use them
  5. Their ability to act calmly under pressure situations

VIII. LEADERSHIP QUALITIES

A. Shows self-control

B. Is honest and fair in all dealings

C. Is loyal

D. Takes responsibility

E. Is tactful

F. Shows enthusiasm

G. Does not give up when the going gets rough

H. Gives clear instructions so all will understand

I. Gets along well with others

J. Is a good listener

K. Always gives credit to others for their work

L. Realizes that there are individual differences in any group

M. Has a pleasing personality and a sense of humor

N. Accepts and gives criticism in a positive manner

O. Is understanding

P. Tells others exactly what is expected

Q. Makes individuals feel good about themselves and their work

IX. LEADERSHIP STYLES

(NOTE: These styles are both good and bad. Never use just one single, but a mixture of all three styles.)

A. Autocratic leader--One person has all of the power and makes all of the decisions.

  1. Closely supervises the group
  2. Never lets others have a say in the planning, organizing, or control of the group
  3. More interested in getting the job done than in respecting the feelings of others

B. Democratic leader--All of the people involved help in decision making; individual opinions are considered.

  1. Allows group members to express their ideas and opinions
  2. Always listens to others
  3. Supervises only as needed, allowing individuals to use their own judgment
  4. Is considerate of the feelings of others
  5. Knows individual's characteristics
  6. Rewards group's effort and is tactful when making criticisms

  (NOTE: This style works well with a cooperative group and when things are going well.)

C. Loose rein leader--very little control by the leader; allows people to do "their own thing" most of the time

  1. The group or organization does the work with very little control or direction.
  2. This style works well with responsible people who like to work alone.

PURPOSES OF OFFICE EDUCATION ASSOCIATION

a. To encourage the development of occupational skills, knowledge, and abilities to a high level of proficiency

b. To develop leadership in the field of office education

c. To develop a sense of individual responsibility

d. To provide opportunities for intelligent career choice in office occupations

e. To encourage use of ethical practices in business

f. To allow opportunity to appreciate and implement the unenforceable obligations of citizenship

g. To provide for mental and physical health through satisfactory social and recreational activities

h. To develop a healthy respect for education

i. To create and nurture an understanding of our free, competitive enterprise system

j. To develop an appreciation of civic and social obligations of those engaged in office occupations

k. To recognize that the focus of attention is on the present and future of youth

OEA PLEDGE

We are met in a spirit of friendship and goodwill as we prepare for lives of service in office occupatins. We work together to attain the goals of OEA and pledge our loyalty to our nation.

OFFICE EDUCATION ASSOCIATION OFFICER INFORMATION

Officers of OEA Chapter

The growth of each local chapter depends upon a well-qualified slate of officers. Before officers are elected, all chapter members should know the duties and responsibilities of each officer as well as have knowledge of the qualities of leadership. It is not advisable to look only for the popular members.

Leadership involves being able to communicate ideas and feelings, a willingness to listen, and a recognition of the need for democratic procedures. A good leader will respect the rights, the ability, and the dignity of everyone. Leadership qualities also include enthusiasm, confidence, open-mindedness, and an interest in everything that concerns the chapter and the community. The goal of the chapter must come before any personal desires.

Each officer shall be familiar with the chapter constitution and bylaws and good parliamentary procedures.

ESSENTIALS OF A GOOD MEETING

Well-planned, regularly held chapter meetings are necessary to maintain member interest, to ensure regular attendance, and to promote the general welfare of the group. An annual program should be planned in September by a committee. Each meeting should be part of the annual program, rather than just a gathering.

Chapter activities should help make school work more interesting--not take the place of school work. Regular night meetings should be held in addition to those held duing the school day. Social and recreational activities should be included in several of the meetings.

Satisfactory chapter meetings should:

1. Be carefully planned
2. Be started and ended on time
3. Move along with enthusiasm and pep to hold the interest and attention of all members
4. Proceed according to the correct order of business
5. Be conducted according to parliamentary procedure
6. Be held in a well-lighted, ventilated, comfortable meeting place
7. Include well-prepared committee reports
8. Show that the officers know their responsibilities

PARLIAMENTARY PROCEDURE

I. What is Parliamentary Procedure?

    A. Parliamentary procedure is a set of rules used in order to obtain group consensus in solving problems and making decisions.

    B. Parliamentary procedure is used to carry on orderly group meetings on the basis of democratic principles.

II. Democratic Principles

    A. The minority is guaranteed the right to express its opinion with protection from the majority provided through parliamentary law.

    B. The majority has the right to decide all issues.

    C. The minority is expected to abide with the decision made by the majority.

    D. Debate of the group must be fair to all present.

    E. All members of the group are free to debate under the rules established.

UNIT OVERVIEW

BEST COPY AVAILABLE

III. Common Parliamentary Procedure Terms

A. Adjourn--to officially close the meeting by a majority vote of those present

B. Amending a motion--to change the previous motion

C. Chair--the office of one who presides over a meeting--president, chairperson, speaker, etc.

D. House--the members of the group assembled, may be referred to as the assembly

E. Meeting--a gathering of the members to conduct business related to the group

F. Minutes--the official record of what occured during a meeting

G. Main motion--a proposal by a group member to the house that certain action be taken

H. New business--business brought before the house for the first time

I. Pro and con--for or against a motion or rule

J. Pro tem--acting during the absence of an officer

K. Proxy--a signed statement by a member authorizing another member to vote in his/her absence

L. Question--means by which discussion of a motion made will cease so the presiding officer can call for a vote by the members

M. Quorum--the number of members who must be present to transact business and/or make decisions

N. Second the motion--when a second member of the house approves the main motion

(NOTE: A main motion will receive no action by the house if it does not receive a second.)

O. Table the motion--to delay decision on a motion

P. Unfinished business--business brought before the house for the second or more times

V. Fundamental Parliamentary Practices

A. The main motion

1. The most common way of bringing business before the house

2. Steps in making a motion

a. Rise and request recognition from the chair--appropriate titles include Mr. President, Madam President, Mr. Chairman, etc.

b. Recognition by the chair

c. Making the motion--"I move that . . ." Such terms as "I so move" or "I make a motion" are incorrect.

d. Seconding the motion--"Madam President, I second the motion."

(NOTE: A motion is seconded without obtaining recognition.)

e. Statement of the question--"It is moved and seconded that . . ." If the question (motion) is debatable, it is then opened for discussion or debate.

f. Recognition by the president--following recognition by the president, a member is entitled to speak.

g. Vote--the final vote is taken after discussion is ended.

B. If you join an organization, club, or association you will observe many more rules of parliamentary procedure which are used to conduct business both more effectively and more efficiently.

I'M ON A COMMITTEE--WHAT DO I DO?

Someone humorously defined a committee as a group of people "who keep minutes and waste hours." Others have suggested that "a camel is really a horse--put together by a committee."

And now it's YOUR turn to serve on a committee!

A BLUEPRINT FOR PLANNING--Planning is a dynamic, continuing, flexible process requiring creative powers, productive activity, and adaptability. A blueprint for planning includes researching the needs, discovering the resources, establishing priorities, designing a program of work, assigning tasks, starting up the program, and continuous evaluation.

MAKING MEETINGS MATTER--Ways of making a meeting function more efficiently are to prepare an agenda, send notice to members, make the physical facilities pleasant, have a time to start and a time to stop, and involve all of the members.

MAKING MEETING MOVE--Most group meetings follow a pattern. Usually the cycle for an effective committee meeting will be: getting started--limited participation, discussion of minor issues--increased participation, discussion on major issues--decisions and recommendations.

PARTICIPATION--NOT MANIPULATION--Remember, the purpose of your being on the committee is participation, not manipulation. Some common manipulative practices are: blocking, evading, bullying, pole sitting, leading, coordinating, encouraging, clarifying, demonstrating, and deciding.

EVALUATION--NOT STAGNATION--A committee sometimes becomes stagnant after its first year of operation. Sadly, the members are unaware of the change. An evaluation check list will help a committee to be effective every step of the way.

FOLLOW-UP--One of the best ways for you to keep track of what is being accomplished in your committee is through follow-up. Once the plan of action is decided upon, the work has just begun. If results are disappointing, the most frequent reason is because someone failed to do a follow-up. To have effective follow-up, the chairman must: assign tasks, suggest resources, communicate regularly, determine strategies, set timetables, and express appreciation.

GUIDELINES FOR LOCAL OFFICERS IN PLANNING ACTIVITIES

1. Activities should contribute to learning objectives.
2. Activities should be directed toward organizational goals.
3. Leadership development should be a major part of all chapter activities. Activities should reflect long-range plans as well as immediate plans.
4. Activities should serve as a means of public relations.
5. Activities should reflect the thinking of the total group.
6. Activities should involve all members.
7. Chapter advisors should act only in advisory capacity.
8. Good activities require time to develop and be carried out. They should not be done without preparation.
9. Instructional program and chapter success are inseparable.
10. Committee work should contribute to overall activity program.
11. Chapter success is dependent upon enthusiasm of officers and advisors.
12. Chapter activities should complement the local school program and benefit all students concerned.

Your chapter may develop a program of activities which may include many projects and activities acceptable only to the local school and community. For this reason, no one program of activities set up by the state office will fit all local chapters. Activities which will stimulate interest and encourage students to work, plan, and develop as a group will aid in the overall instructional program. This will develop leadership abilities in students.

POINTERS FOR A PRESIDING OFFICER

1. The president presides at all meetings unless otherwise specified in the bylaws.
2. Before opening the meeting, the president should determine if the proper materials are ready, which include a well-prepared agenda, a gavel, a copy of the parliamentary authority, a timepiece, and a calendar.
3. The president should have some experience supported by a sense of humor, much-needed patience, and a sincere, gracious manner that indicates true interest in the members.
4. The meeting should be called to order on time, after it has been determined that a quorum is present.
5. The president should be referred to as "the chair," keeping the tone of the meeting impersonal.
6. An impartial presiding officer should remember to extend the courtesies of debate to both sides.
7. A president should maintain order by insisting that members address the chair and await recognition.
8. The president relinquishes the chair to the vice-president to take part in debate, except when a member appeals the chair's decision.
9. All questions should be stated clearly before taking the vote. The maker of the motion is entitled to the floor first when debate is called for.
10. The result of the vote and what has been ordered by the assembly should be announced before presenting the next business in order.
11. A standing vote should be called for if there is a doubt as to the voice vote.
12. The president should reserve the right to make a ruling after seeking advice from a qualified parliamentarian.
13. The president votes on all ballot votes and when necessary to break a tie vote.
14. The president expedites business wtih the use of the vote by general consent in routine business.
15. The Golden Rule is the basis of parliamentary law. People learn to disagree agreeably, thereby guarding the valued American heritage of a free society.

SUGGESTED ORDER OF BUSINESS FOR CHAPTER MEETINGS

At the beginning of the meeting the president is seated in the front of the room. The other officers may be seated in a semicircle on either side of the president or in any other desired fashion that will facilitate the conduction of business.

Ceremony for Opening a Meeting:

1. The president stands and gives two raps of the gavel for attention. He or she says, "The meeting will come to order. We are now holding a meeting of the ____________________ chapter of the Office Education Association of Texas. Mr./Ms. Vice-President, what are the major purposes of our organization?"

2. The vice-president says, "We recognize the importance of office occupations and understand the contributions that have been made to our country by workers in this expanding field. We are preparing to take our places in these challenging occupations. We work together in the OEA to develop essential competencies in leadership, scholarship, character, and citizenship so that we may share in the improvement of our economy and the advancement of our nation."

3. The president says, "May we accomplish these objectives. Mr./Ms. Vice-President, will you please present the other officers."

4. The vice-president responds: "With pleasure, I introduce ______________ (name of each officer and office held. As each officer is introduced, stand and remain standing until seated by the president. Introduce in order the sergeant-at-arms, parliamentarian, historian, reporter, secretary, treasurer, vice-president, and president.) Mr./Ms. President, all officers are at their stations."

5. The president says, "Will the members please rise and join me in stating why we are here." (Raps three time with gavel--the members should rise on the third rap of the gavel.)

6. The president, with one rap of the gavel, says "Please be seated."

Procedures of Continuation of Meeting

7. The president states, after the members are seated, "The secretary will please read the minutes of the previous meeting on _____(date)_____." The secretary rises, and without addressing the chair, reads the minutes distinctly, then sits down.

   The president then says, "Are there any corrections to the minutes?" The one word "corrections" covers all. "The minutes are approved as read" (or "as corrected").

8. The treasurer's report is called for next by the president. It should be summarized as much as possible but should still give a comprehensive statement of the financial condition of the chapter. After it is read, the president states, "Are there any questions concerning the treasurer's report? (pause) The treasurer's report will be filed for audit."

9. The reports of officers, given in the order of rank, are called for next.

10. The reports of committees are then called for by the president.

11. Unfinished business is taken up at the call of the chair or of the meeting.

12. New business is then introduced.

13. The program, if any, may be held at this point. This is considered part of the meeting and the president presides throughout with the assistance of the program chairperson.

Ceremony for Closing a Meeting

14. The president says, "Mr./Ms. Secretary, do you know of any further business which should be transacted at this time?"

15. The secretary rises, replies "I have none, Mr./Ms. President," and sits down.

16. The president says, "We are about to adjourn this meeting of the ____________________ chapter of the Office Education Association of Texas. As we associate together, let us be dedicated, courteous, and honest. Fellow members, join me in a salute to our flag."

    Raps three times with the gavel to call the members to stand. All members face the flag and with their hands over their hearts, repeat the following pledge:

    "I pledge allegiance to the Flag of the United States of America and to the Republic for which it stands, one Nation under God, indivisible, with liberty and justice for all."

17. The president says, "I now declare this meeting adjourned." (Taps once with the gavel and the meeting is adjourned.)

LEADERSHIP DEVELOPMENT

ACTIVITY SHEET 1--UNSCRAMBLING TERMS

Directions: Unscramble the following terms. Use the unscrambled word to complete the sentence.

1. A person who believes in something has _______________. (fdoceencni)
2. Someone who is full of interest is _______________. (ttusenicsaih)
3. A person who involves all the people in making a decision is a ___________ leader. (mcitdceora)
4. A person who has a strong belief in him/herself has _______________. (leenffescnodic)
5. A person having complete power over others is an _______________ leader. (ocaurattci)
6. The condition of being faithful is known as _______________. (yylolat)
7. A person who believes there is more good than bad in life is ____________. (imsipotcit)
8. One reason for becoming a leader is to gain _______________. (taumtyir)
9. Leadership _______________ may be developed. (loptnitea)
10. No two people have the same _______________. (sateporliny)

ACTIVITY SHEET 2--DO YOU HAVE WHAT IT TAKES ?

Directions: Although a test does not exist that can be used to predict your success as a leader, there are certain characteristics that most authorities agree that a leader must possess more of, to a greater degree, than nonleaders. To find out if you possess these traits, circle the letter of the answer that best describes the action you would take to the following situations:

SECTION I

The principal of your school has just announced that the school board, "in order to provide an environment more conducive to learning," voted last night that students no longer be allowed to wear blue jeans of any kind to school or to any school function. Of course, everyone in school is furious!

I would:

A. Immediately organize a group to see what we could do to get the board to change their minds.

B. Wait and let others in my school organize the group.

C. Let it be known that I would help in any way possible to get the rule changed.

SECTION II

Suppose that the group has been formed, and upon looking at the rule more closely, it is worse than imagined. They want all the girls to wear dresses and the boys to wear suits and ties. It will require a lot of hard work and time to get the board members to change their minds.

I would:

A. Let the rule go on as it is--there's no use fighting.

B. Do what the group decided to do.

C. Give all my time and work as hard as I could to persuade the board members to change their minds.

SECTION III

Suppose the group decides to meet from 3:30 - 4:30 every day after school to develop a plan; your favorite television program, even though it is a rerun, is shown during that time.

I would:

A. Forget being a part of the group; seeing my program is more important.

B. Attend every meeting--no matter what time it is being held.

C. Still be a part of the group, but not attend the meetings; the group can fill me in on what happened at the meetings the next morning at school.

SECTION IV

Suppose that several plans have been discussed by the group to persuade the school board members to change their minds. You have an idea that you really think will work, but the group keeps discussing all of the plans.

I would:

A. Suggest the group vote on the plan the group as a whole feels would be best.

B. Tell the group that I will no longer be a part of the group unless they use my plan.

C. Just sit back and let the group continue discussing the plans.

SECTION V

The big day has finally arrived! The group has been given permission by the school board to present its plan at the school board meeting tonight. In thinking about the way to present the plan to the board,

I would:

A. Express the group's plan in a calm, reasonable way.

B. Begin by saying how angry the students are!

C. Let another group member worry about being the one to present the plan.

SECTION VI

While presenting the plan to the school board, you notice that by the way they are looking at you, they do not seem willing to change their minds.

I would:

A. Continue the presentation and hope that by the time I finished they would understand how we felt.

B. Sit down, but not before I told them that I thought their idea stinks.

C. Sit down and let another group member take over; maybe he/she will have better luck than I.

ACTIVITY SHEET 3--WHAT'S YOUR STYLE ?

Directions: To find out what kind of leader you will be, place in the space the letter that best describes the way you would act if you were the leader of a work group. A--Always, F--Frequently, O--Occasionally, S--Seldom, or N--Never.

I would:

_____ 1. act as the speaker of the group

_____ 2. encourage overtime work

_____ 3. allow group members complete freedom in their work

_____ 4. encourage all to do tasks the same way

_____ 5. permit others to use their own judgment in solving problems

_____ 6. work the group members as hard as it took to be ahead of competing groups

_____ 7. speak as a representative of the group

_____ 8. push members for greater effort

_____ 9. let the members do their work the way they think best

_____ 10. not mind decisions being put off until later if it were necessary

_____ 11. speak for the group when visitors were present

_____ 12. keep the work moving at a rapid pace

_____ 13. turn the members loose on a job and let them go to it

_____ 14. push others to increase the work they are doing

_____ 15. settle conflicts when they occur in the group

_____ 16. represent the group at outside meetings

_____ 17. not allow the members freedom of action

_____ 18. decide what should be done and how it should be done

_____ 19. not mind others thinking I was too tough on them

_____ 20. assign group members to particular tasks

_____ 21. let some deserving members have authority

_____ 22. let the members decide when and how to do their work

_____ 23. be willing to make changes

_____ 24. ask the members to work harder

_____ 25. trust the group members to exercise good judgment

_____ 26. schedule the work to be done, but distribute it fairly

_____ 27. refuse to explain my actions

_____ 28. persuade others that my ideas are to their advantage

_____ 29. permit the group to set its own pace

_____ 30. let them know it will be done my way or no way at all

_____ 31. act without consulting the group

_____ 32. tell the group members that if one rule or regulation is broken by any employee, it will result in his/her being fired

Scoring:

Write the number 1 in front of the space if you responded A--Always or F--Frequently. Circle the number 1's which you have written in front of the following items:

3, 5, 9, 10, 13, 15, 21, 22, 23, 25, 26, 29

Count the number 1's. This is your score for concern for people. Count the uncircled number 1's. This is your score for concern for task.

People _______________ Task _______________

A high score on "Concern for People" suggests that your leadership style ranges from a loose-rein style to a democratic style. A high score on "Concern for Task" suggests you tend to have an autocratic leadership style.

ACTIVITY SHEET 4--IDENTIFYING LEADERS

A. In my opinion the following five well-known people possess true leadership qualities:

1. ______________________ because ______________________

____

____

2. ______________________ because ______________________

____

____

3. ______________________ because ______________________

____

____

4. ______________________ because ______________________

____

____

5. ______________________ because ______________________

____

____

B. The person I most admire and want to be like is ______________________.
In my opinion he/she is a leader because ______________________

____

____

____

C. Plan to become a good leader by answering the following questions about yourself and why you feel that way.

1. I will become a good follower first by ______________________

____

____

2. My strong points that I can build on are ______________________

____

____

3. My weak points that need improving are ______________________

____

____

4. The qualities of leadership I want to attain are ______________________

____

____

5. I believe (or I do not believe) that leaders need to be trained because ____________________

____

D. Think of two people you know who are in leadership positions. How were they chosen to fill the positions?

1.

2.

E. What are some of the reasons that you could be chosen for a leadership position? Finish this sentence: I feel that I could be chosen for a leadership position because I ____________________

____

____

F. How would you act in your new leadership position? Finish this sentence: In my new leadership position, I would act (like) ____________________

____

____

ACTIVITY SHEET 5--LEADERSHIP QUALITIES

Directions: Complete the following exercises relating to leadership qualities.

A. A good leader must possess many positive attitudes. Think of an important leadership quality that begins with each letter of the word "Leadership" written below. Do not use any word more than once.

L

E

A

D

E

R

S

H

I

P

B. Now write your name down the side of the page and think of leadership qualities to go with the letters.

EXAMPLE: D--dependable
E--energetic
A--assumes responsibility
N--never quits

ACTIVITY SHEET 6--OEA PLEDGE AND EMBLEM

1. Write the OEA Pledge.

2. Draw the OEA Emblem.

ACTIVITY SHEET 7--CONDUCTING BUSINESS

Directions: Your class has been selected by the principal to conduct a fund raising drive. Your class must decide during this class period the means by which the class will raise the money. Conduct a class meeting according to the fundamental principles of democracy.

ANSWERS TO ACTIVITY SHEETS

ACTIVITY SHEET 1

1. confidence
2. enthusiastic
3. democratic
4. self-confidence
5. autocratic
6. loyalty
7. optimistic
8. maturity
9. potential
10. personality

ACTIVITY SHEET 2

Section I measures initiative.

Answer A - You have initiative; you take action rather than waiting for others.
Answer B - You let others worry about problems.
Answer C - You want to be a group leader; however, you lack the initiative to be considered a leader.

Section II measures motivation.

Answer A - When the going gets tough, you give up.
Answer B - You leave the major decisions to others.
Answer C - You have motivation.

Section III measures dependability.

Answer A - You lack dependability, which is a very important trait for a leader. What if every member of the group decided to stay at home to watch their television program?
Answer B - You are dependable.
Answer C - You still want to be part of the group, but only when it is convenient for you.

Sectin IV measures belief in democracy.

Answer A - You believe in democracy--giving others the chance to decide what would be best.
Answer B - You believe in the opposite of democracy. It is either your way or no way at all.
Answer C - Although it could be said you have a belief in democracy, discussing plans could go on forever.

Section V measures your ability to communicate.

Answer A - You are able to get your ideas over to others in a way that can be understood easily.
Answer B - Put yourself in the board members' places. Would you be ready to listen after the presentation started in this manner?
Answer C - Although it would be said that you tried to communicate, you gave up before you saw any results.

Section VI measures your strength of conviction

Answer A - You possess strength of conviction. You abide by the decisions you think are correct, even though a majority of others may not think so.
Answer B - What could ever be accomplished by choosing this action?
Answer C - Even though you care what happens, choosing this answer shows that you do not possess strength of conviction.

ACTIVITY SHEETS 3 - 7.

Evaluated to the satisfaction of the instructor

UNIT TEST

A. Match the following terms to their definitions by placing the correct letter in the blank at the left.

_____ 1. Optimistic

_____ 2. Democracy

_____ 3. Autocratic

_____ 4. Leadership

_____ 5. Motivation

_____ 6. Strength of conviction

_____ 7. Maturity

_____ 8. Initiative

_____ 9. Dependable

_____ 10. Communicate

a. the practice of allowing equal participation by all members of society

b. reliable

c. the condition of being fully grown

d. belief that there is more good than bad

e. the ability to get things done without needing to be told to do so

f. a desire that makes you do something

g. to make a logical decision and stick by it, even if the majority do not agree with you

h. having complete power

i. the ability to inspire confidence and loyalty so that others follow willingly in order to achieve a desired goal

j. the ability to get information across so that it is understood by another person

B. Define leadership:

C. Fill in the blanks by using the words listed below to complete the following statements concerning the advantages of becoming a leader.

challenges
goals
maturity
leadership
listen
respect
self-confidence

1. An individual gains ____________________.

2. An individual gains ____________________.

3. An individual learns to ________________ and to ________________ the opinion of others.

4. An individual learns to meet new ____________________.

5. ____________________ is something that can be applied to other areas of an individuals life.

6. ____________________ can be reached faster through a leadership role.

D. Fill in the blanks by using the words listed below to complete the following statements concerning the disadvantages of becoming a leader.

well-informed
harder
optimistic
enthusiastic
abide

1. You must be willing to work ____________________ than anyone else.

2. You must be ____________________.

3. You must be able to ____________________ be a decision even though the majority may disagree with you.

4. You must remain ____________________ and ____________________ even though you may not be.

E. Answer the following statements True or False by placing a T for True or an F for False in the space at the left.

_____ 1. The first step to becoming a good leader is to become a good follower.

_____ 2. Learning your strong and weak points helps you to become a leader.

_____ 3. Leaders are born, not made.

_____ 4. Good leaders are chosen by their abilities.

_____ 5. Good leaders do not need to know any leadership steps to be chosen.

F. Place an "X" by the statements that indicate good leadership qualities.

_____ 1. Initiative

_____ 2. Taking credit for work done by others

_____ 3. Motivation

_____ 4. Pleasing personality

_____ 5. Ability to communicate

_____ 6. Strength of conviction

_____ 7. Belief in democracy

_____ 8. Disloyalty

_____ 9. Dependability

_____ 10. Sense of humor

_____ 11. Sympathy and understanding

G. List three places where leadership skills can be used.

1.

2.

3.

H. Identify the style of leadership that best fits each situation by writing the name of one of the following styles.

democratic loose-rein autocratic

1. Tom makes all the decisions at Big R Company. The employees are never allowed to voice their opinions.

What leadership style is Tom using? ____________________

2. Bill lets the employees of ABC Company do just about anything they wish to do.

What leadership style is Bill using? ____________________

3. Maria lets the employees help in the decision making of RC Company. Others' opinions are always appreciated and seriously considered.

What leadership style is Maria using? ____________________

ANSWERS TO UNIT TEST

A. 1. d
2. a
3. h
4. i
5. f
6. g
7. c
8. e
9. b
10. j

B. The ability to inspire confidence and loyalty so that others follow willingly in order to achieve a desired goal.

C. 1. self-confidence
2. maturity
3. listen; respect
4. challenges
5. leadership
6. goals

D. 1. harder
2. well-informed
3. abide
4. enthusiastic; optimistic

E. 1. T
2. T
3. F
4. T
5. F

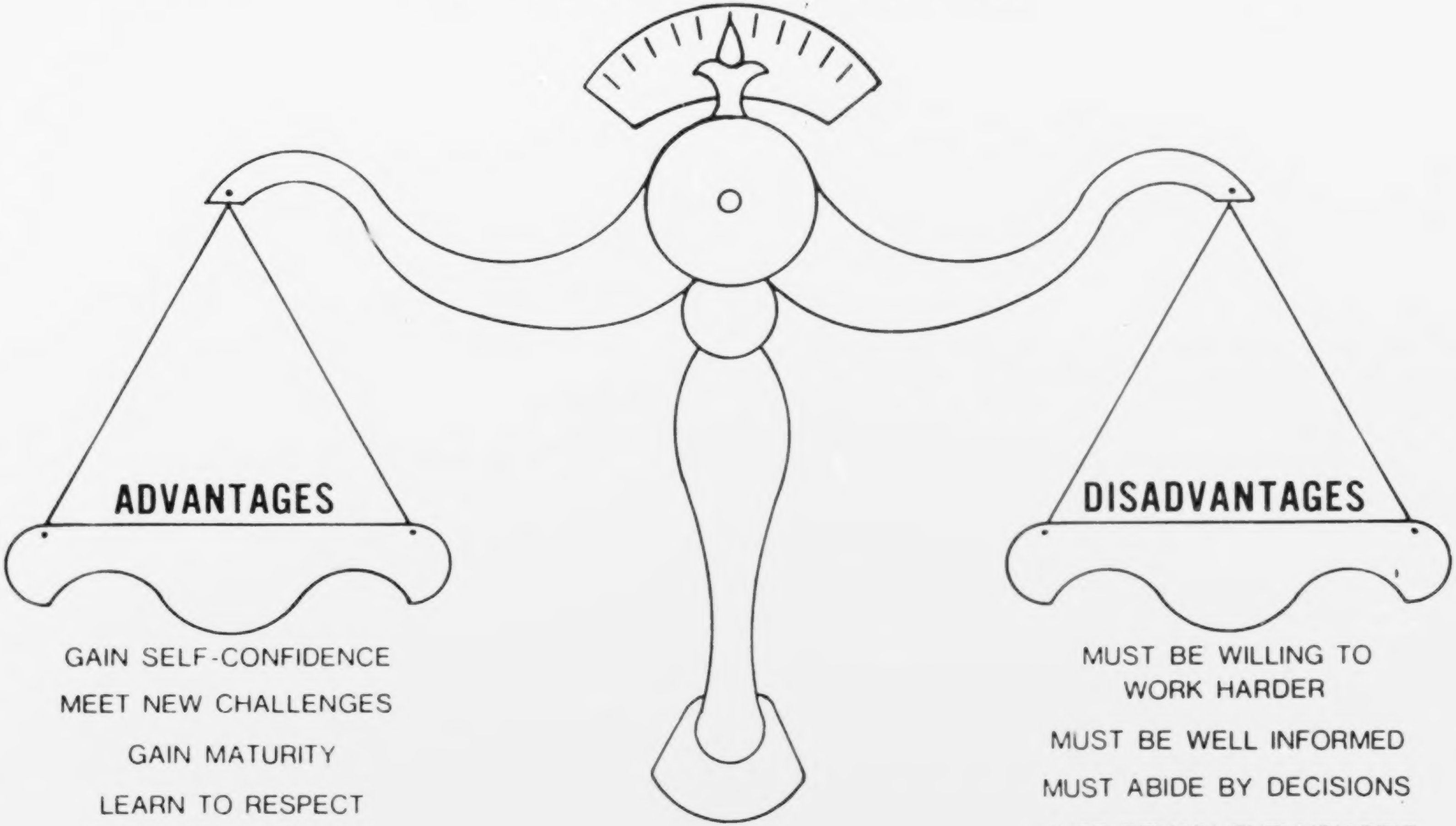
F. 1. X
2.
3. X
4. X
5. X
6. X
7. X
8.
9. X
10. X
11. X

G. Three of the following:

1. school
2. work
3. church
4. clubs

H. 1. autocratic
2. loose-rein or laissez-faire
3. democratic

ADVANTAGES/DISADVANTAGES OF BEING A LEADER



ADVANTAGES

GAIN SELF-CONFIDENCE

MEET NEW CHALLENGES

GAIN MATURITY

LEARN TO RESPECT OPINIONS OF OTHERS

REACH GOALS FASTER

DISADVANTAGES

MUST BE WILLING TO WORK HARDER

MUST BE WELL INFORMED

MUST ABIDE BY DECISIONS

MUST REMAIN ENTHUSIASTIC AND OPTIMISTIC

QUALITIES OF A GOOD LEADER

ENTHUSIASTIC

MENTALLY ALERT

HONEST

OPEN-MINDED

PROGRESSIVE

LISTENS

INSPIRES OTHERS

TACTFUL

TOLERANT

SELF-CONFIDENT

IS LOYAL TO FIRM

COOPERATES WITH OTHERS

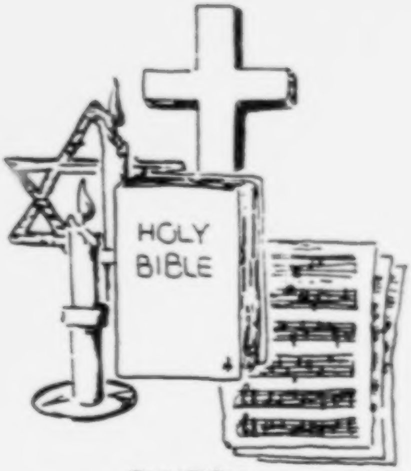
HAS A SENSE OF HUMOR

ASSUMES RESPONSIBILITY

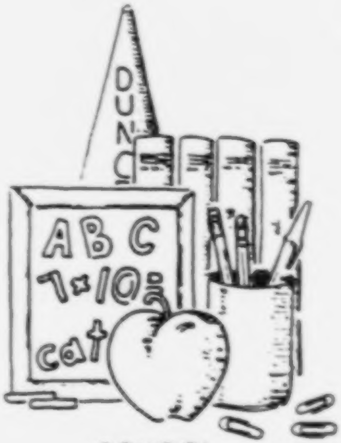
WAYS TO SHOW LEADERSHIP ABILITY

- Be willing to assume responsibility.
- Take pride in doing a good job.
- Be a good listener.
- Be fair.
- Know that your responsibility is to let others share responsibilities with you.
- Use the talents of each person in the group or organization to the fullest potential.

WHERE LEADERSHIP IS USED



CHURCH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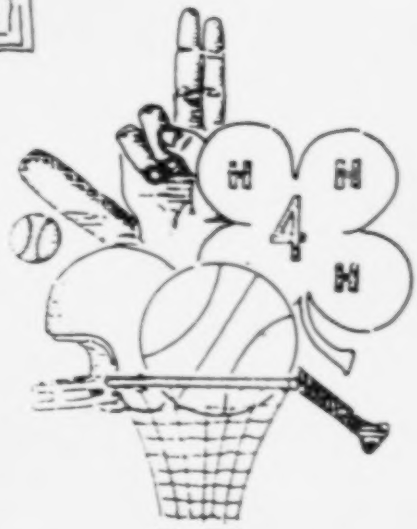
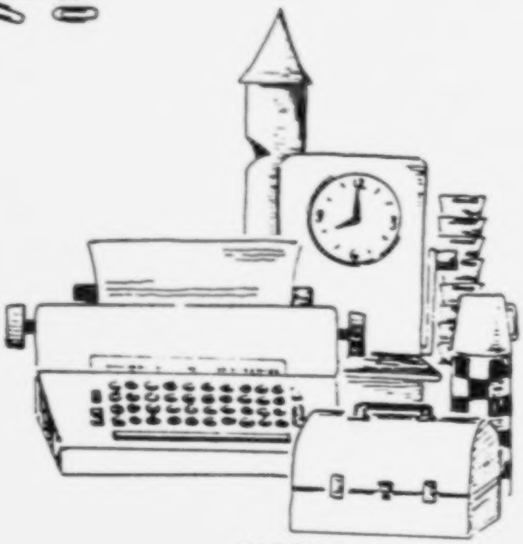
SCHOOL

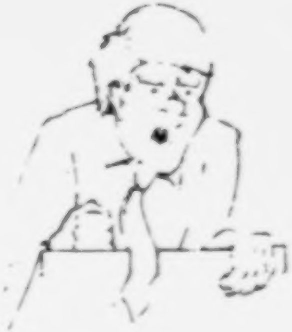


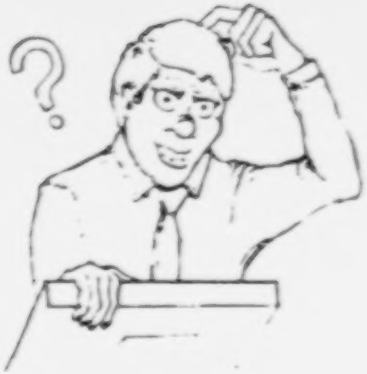
CLUBS

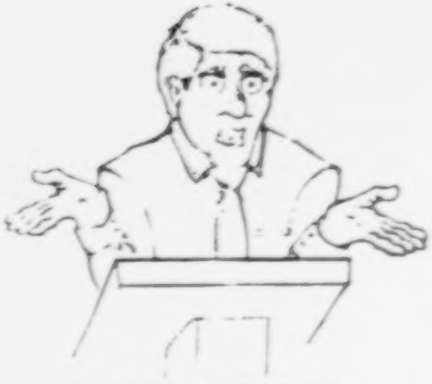


WORK

CHOOSING A LEADERSHIP STYLE







	AUTOCRATIC	**DEMOCRATIC**	**LOOSE-REIN**
ADVANTAGE	Quick decisions and discipline especially in crisis situations.	A true leader may emerge from the group.	Group members who help make a decision are more likely to be interested in carrying it out.
DISADVANTAGE	Group interest in carrying out decisions tends to be low.	Often leads to confusion, disorganization, indecision. May take too long to make and carry out decisions.	Takes longer to make decisions. Not practical in crisis situations.
USEFULNESS IN WORK SITUATIONS	May be the best style for crisis situations when decisions must be made quickly.	Not usually suitable, because of confusion and time it takes to make and carry out decisions.	Most useful in non-crisis situations where it is helpful to have group members involved in carrying out decisions.

ENTREPRENEURSHIP

75.81(a)(3) Concepts and skills associated with entrepreneurship. The student shall be provided opportunities to:

(a) Recognize opportunities and options for business ownership

(b) Identify entry-level procedures, planning processes, and terms needed to open a business

(c) Develop an understanding of the role of small business in the free enterprise system

ENTREPRENEURSHIP

UNIT OUTLINE

UNIT OBJECTIVE

After completion of this unit, the student will be able to demonstrate a knowledge of entrepreneurship. This knowledge will be evidenced through demonstration and successfully completing the unit test.

SPECIFIC OBJECTIVES

1. Identify terms and definitions associated with entrepreneurship.
2. Recognize opportunities and options for business ownership.
3. Identify entry-level procedures, planning processes, and terms needed to open a business.
4. Develop an understanding of the role of the small business in the free enterprise system.
    - A. Identify necessary parts of an economic system and give an example of each economic part.
    - B. Identify the decisions that must be made in an economic system.
    - C. Identify the decision-makers in an economic system.
    - D. Match the major economic systems in operation today with the statements which define the systems.
    - E. Identify the major factors of a free enterprise economic system.
    - F. Describe those things that keep our free enterprise system in balance.

TEACHER ACTIVITIES

1. Provide students with Unit Overview information.
2. Make transparencies.
    - A. TM-1--Necessary Parts of an Economic System
    - B. TM-2--Types of Economic Systems
    - C. TM-3--How Profit and Competition Help the Flow of Goods and Services in a Free Market
3. Discuss unit and specific objectives.
4. Show and discuss transparencies.
5. Discuss information and activity sheets.
6. Have students complete activity sheets.
7. Invite as a guest speaker the owner of a small business in your community.
8. Secure film on Free Enterprise or Entrepreneurship.

STUDENT ACTIVITIES

1. Read objective sheet.
2. Study Unit Overview information.
3. Complete activity sheets.
    - A. Activity Sheet 1--Word Find
    - B. Activity Sheet 2--Starting Your Own Business
    - C. Activity Sheet 3--Am I an Entrepreneur?
    - D. Activity Sheet 4--The Necessary Parts
    - E. Activity Sheet 5--Working in Different Types of Economic Systems Systems
    - F. Activity Sheet 6--Creating Your Own Enterprise
4. Participate in class discussion.
5. Take test.

EVALUATION- Unit Test

ESTIMATED COMPLETION TIME

RETEACH ACTIVITIES:

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the Resources Section

RESOURCES

BAROMETER OF SMALL BUSINESS
Accounting Corporation of America
1929 First Ave.
San Diego, CA 92101

BETTER COMMUNICATIONS IN SMALL BUSINESS
Small Business Administration

BUYING AND SELLING A SMALL BUSINESS
Small Business Administration

COST ACCOUNTING FOR SMALL MANUFACTURERS
Small Business Administration

CREATING A NEW ENTERPRISE
Text-Workbook
South-Western Publishing Co.

DISCOVERING ENTREPRENEURSHIP
Filmstrips and Cassettes
South-Western Publishing Co.

ENTREPRENEURSHIP AND VENTURE MANAGEMENT
Textbook
Charles E. Merrill Publishing Co.

SET OF ENTREPRENEURSHIP MODULES
Ohio State University
Instruction Materials Laboratory
Columbus, OH 43210-1302

FACTS ABOUT FRANCHISING
National Better Business Bureau, Inc.
230 Park Avenue
New York, NY 10017

THE FINANCING OF SMALL BUSINESS
James Bates
Sweet and Maxwell
London, England
1971

FINDING AND HIRING THE RIGHT EMPLOYEES
Small Business Administration

HOW SMALLER COMPANIES ARE TACKLING THEIR FINANCIAL PROBLEMS
B. Munder
Management Review
January, 1975

HOW TO GET STARTED IN YOUR OWN FRANCHISED BUSINESS
Farnsworth Publishing, Inc.
1967

HOW TO START YOUR OWN BUSINESS
William D. Putt
MIT Press
28 Carleton St.
Cambridge, MA 12142
1974

INTRODUCTORY GUIDE TO ENTREPRENEURSHIP
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

KEY BUSINESS RATIOS
Dunn and Bradstreet, Inc.
99 Church St.
New York, NY 10007

RETIREMENT PLANS FOR SELF-EMPLOYED INDIVIDUALS
Internal Revenue Office
Document No. 5592

75.81(a)3

OBJECTIVE: After completion of this unit, the student will be able to demonstrate a knowledge of entrepreneurship. This knowledge will be evidenced through demonstration and successfully completing the unit test.

	MASTERY	NON MASTERY
1. Identify terms and definitions associated with entrepreneurship.		
2. Identify entry-level procedures, planning processes, and terms needed to open a business.		
3. Identify necessary parts of an economic system and give an example of each economic part.		
4. Identify the major factors of a free enterprise economic system.		
5. Complete Activity Sheets.		
A. Activity Sheet 1--Word Find		
B. Activity Sheet 2--Starting Your Own Business		
C. Activity Sheet 3--Am I An Entrepreneur?		
D. Activity Sheet 4--The Necessary Parts		
E. Activity Sheet 5--Working in Different Types of Economic Systems		
F. Activity Sheet 6--Creating Your Own Enterprise		
6. Unit Test		

PERFORMANCE CHART

I. GENERAL INFORMATION

A. This unit is designed for a short, concise coverage of entrepreneurship.

B. The Unit Overview is designed to give the basic information needed for a general knowledge of entrepreneurship. It could be supplemented with resources and references given in the Resource Section.

C. If you wish to teach a comprehensive unit on this subject, it is suggested that you use the OCL publication, Entrepreneurship Introductory Guide.

D. Additional activities may be found in the OCL publication, Entrepreneurship Introductory Guide.

II. UNIT OVERVIEW

A. Have students give their definition of entrepreneurship.

B. Discuss with students the type of individual who might think about entrepreneurship.

C. Have students complete ACTIVITY SHEET 1--WORD FIND.

D. Invite an entrepreneur from the community to speak to the class on how he/she got started and his/her feelings concerning entrepreneurship. (Students may also be taken on a field trip to a business started by an entrepreneur.)

E. Complete ACTIVITY SHEET 2--STARTING YOUR OWN BUSINESS so that students may gain an understanding of the pros and cons of entrepreneurship.

(NOTE: Before beginning this activity, check with a school official--principal, business manager, superintendent, etc.--concerning your school district's policy on money-making projects. This activity will require a great deal of supervision and guidance from you.)

1. Should students have difficulty in deciding on a product or service, give them the following examples:

Products to be sold	Services to provide
(a) Candy	(a) Word processing service
(b) School supplies	(b) Cooking meal for community members and/or teachers, etc. and serving it in the school cafeteria.
(c) T-shirts (with your school logo)	(c) Talent show

2. Use the information on st[illegible]ing your own business contained in ACTIVITY SHEET 2--STARTING [illegible]USINESS as a guide for stimulating class participation.

3. All class periods may be combined; however, each student should be given the opportunity to make decisions concerning the planning and organizing of the business.

4. Stress that the steps to small business success included on ACTIVITY SHEET 2 are only a few of those that would be completed if an actual business were being started.

5. The profit of this money-making project may be used to purchase capital outlay items or consumable items for your classroom, may be contributed to a charitable organization, may be used to finance an out-of-town field trip, etc.

F. Use ACTIVITY SHEET 3--AM I AN ENTREPRENEUR?

1. Assist students in evaluating their responses.

2. Discuss with students why each area would be important.

EXAMPLE: Are you a self-starter?

ANSWER IMPORTANT TO AN ENTREPRENEUR

I do things on my own. Nobody has to tell me to get going.

III. ANSWERS TO ASSIGNMENT SHEETS--Some of the Assignment Sheets will not have specific answers; grading should be based on student participation.

IV. UNIT TEST

A. The test is divided into four parts. Each part uses various methods testing.

B. Various approaches may be used in testing.

1. Each part of the test after the student has completed that information.

2. Give the entire test upon completion of all the Information and Activity Sheets.

3. Give one or several parts of the test as an additional assignment or to reinforce problem areas of learning.

C. Add test parts corresponding to any Information or Activity Sheets added to the unit.

V. ANSWERS TO UNIT TEST

TERMS AND DEFINITIONS

1. Agrarian--having to do with the land

2. Business--a place where products and services are bought and sold

3. Competition--struggling against another person or business in order to make a better product or service at a lower price

4. Economic--having to do with meeting a person's needs, for example food and a place to live

5. Economic goals--what a person wants to do economically, such as buy a house, take a vacation, or have a large savings account

6. Economic system--how a government goes about meeting the economic needs of the country

7. Economically efficient--making the best use of time, money, and people

8. Economically free--having enough money so that a person does not need to worry about financial matters

9. Economically just--being treated fairly financially, such as being paid for the work one does

10. Economically secure--knowing that your financial needs will be taken care of

11. Enterprise--a business

12. Entrepreneur--a person who starts or buys a business

3. Entrepreneurship--a small business started by one or more people

14. Financial--having to do with money

15. Free enterprise economic system--an economic system in which the people, not the government, own the businesses

16. Independently managed--a person's being allowed to run a business as he/she wants

17. Independently owned--not part of another business

18. Industrial--businesses that deal with machines rather than with the land

19. Manage--being responsible for a business

20. Market place--where products and services are bought and sold

21. Monopoly--business that is so dominant within its field that there is no competition for the products and services that it sells

22. Natural resources--anything that is not man-made and which is found in the environment, such as land, trees, water, and minerals

23. Product--that which a business sells, such as car parts or office supplies

24. Profit--the money left after all the bills have been paid

25. Responsible--making decisions and deciding how something is to be done

26. SBA--Small Business Administration

27. Services--that which is done for another person, such as cleaning houses or typing

28. Small business-a business that is independently owned, independently managed, and not dominant in its field

29. Small enterprise--a small business

30. Sole proprietor--a person who is the only owner of a business

31. Stockholder--a person who owns part of a business but who may not be involved in it on a day-to-day basis

TRAITS OF ENTREPRENEURSHIPS

I. Entrepreneurships are new businesses that are started or bought by one or more people.

II. Entrepreneurships are owned by one or more people.

    A. A person who is the only owner of an entrepreneurship is called the sole proprietor.

    B. If two or more people start or buy a new business together, they are partners.

III. An entrepreneurship is not part of another business.

    A. Entrepreneurships are independently owned.

    B. Entrepreneurships are independently managed.

IV. Entrepreneurships may sell only one or two products or services.

V. Entrepreneurships may be managed from the home.

A. Many entrepreneurships that sell services are managed from the home.

B. A person who begins an entrepreneurship will need to check the laws where he/she lives to see if it is all right to have a business in the home.

(NOTE: These types of laws are called zoning laws.)

VI. Entrepreneurships are often begun as part-time jobs in order to make more money.

VII. An entrepreneur is a person who starts an entrepreneurship.

A. Traditional entrepreneurs are people who start a business to make and sell new products and services.

1. Henry Ford was a traditional entrepreneur; he built cars and started the Ford Motor Company.

2. John D. Rockefeller was a traditional entrepreneur; he started the Standard Oil Company of Ohio.

B. Modern entrepreneurs are people who start or buy a business, but the products and services are not new.

1. Someone who begins a painting business is a modern entrepreneur.

2. Someone who buys a business to run is a modern entrepreneur.

WHY ENTREPRENEURS HAVE THEIR OWN BUSINESSES

I. People become entrepreneurs for two main reasons.

A. Entrepreneurs want to be their own boss.

1. To be able to make decisions

2. To use their abilities

3. To solve problems

B. Entrepreneurs want to earn more money.

II. There are many other reasons that people become entrepreneurs.

A. New businesses are easy to begin.

1. Small entrepreneurships may be started without much money.

2. Not as many laws govern small entrepreneurships.

B. Entrepreneurships can be given up easily.

1. Fewer people need to be thought about when stopping an entrepreneurship.

2. Getting rid of products may not be a problem because there are not as many being sold.

C. Entrepreneurs do not need to share profits with other people.

D. Taxes on some entrepreneurships are not as great as they are for large businesses.

E. Entrepreneurs can take pride in owning their business.

F. Entrepreneurs can use many of their skills and talents in their business.

1. Many people do not get to use all of their skills when they work for someone else.

2. Many people get bored when they have to work for someone else.

G. Entrepreneurs can make decisions.

1. They have more responsibility.

2. They can make quick decisions that will help the businesses.

WHY WE NEED TO LEARN ABOUT ENTREPRENEURSHIP

I. Anyone can be an entrepreneur.

II. There are many entrepreneurships in the United States.

A. Many people work for entrepreneurs.

B. Many people will become entrepreneurs.

III. Many entrepreneurships go out of business every year.

   A. People need to know how to keep their businesses going.

   B. People need to know how to make their businesses better.

IV. To learn how to overcome the risk of starting an entrepreneurship.

   A. By buying a business that already exists and is successful.

   B. By buying into a franchise business.

   C. By learning how to develop a good business plan.

V. Some examples of entrepreneurships.

   A. Typewriter repair

   B. Office supply store

   C. Office machine rental

   D. Word processing service

   E. Day-care for children

   F. Vending machine service

   G. Plumbing

AMERICA AND FREE ENTERPRISE

I. In some countries, a person cannot start his/her own business.

   A. Some governments decide what types of businesses will be started.

   B. Some governments decide who will manage the new businesses.

II. In America, anyone can start his/her own business.

   A. People who do not speak English can start their own businesses.

   B. People who are physically handicapped can start their own businesses.

III. America had a free enterprise economic system.

   A. A free enterprise economic system can be agrarian or industrial.

      1. An agrarian entrepreneur might start a business where he/she can work outdoors.

         a. Start some type of farm

         b. Raise and sell plants

      2. An industrial entrepreneur might start a business where he/she works with machines.

         a. Make and sell machine parts.

         b. Own a small engine repair shop.

      3. Entrepreneurs can start the business they like if they live in a free economic system.

   B. In America, entrepreneurs can own land and buildings.

      1. The American entrepreneur can manage his/her business.

      2. In some economic systems, land and buildings are owned by the government.

      3. Freedom to own land and buildings can help a person start his/her own business.

      4. Land and buildings can be used to get money to start a business.

   C. In a free enterprise economic system, people can buy the products and services that they want.

      1. Entrepreneurs can make and sell many products and services for people to buy.

      2. Entrepreneurs in America do not have to worry about people buying products and services from only one or two people.

   D. In a free enterprise economic system, competition is encouraged.

      1. Entrepreneurs can sell the same products and services that large businesses sell.

      2. If an entrepreneur can make and sell a product or service for less than someone else, he/she will get more work.

3. Competition helps to keep prices low.
4. Monopolies are not allowed in free enterprise economic systems.

E. Profit is a motive in free enterprise.

1. Entrepreneurs can earn much money.
2. Profits help the entrepreneur to expand his/her business.
3. Entrepreneurs can set the prices for the products and services they sell.

IV. Entrepreneurs can open their own businesses in the American free enterprise system.

A. Entrepreneurs can use America's natural resources to open a business.

1. Entrepreneurs can purchase natural resources to make products.
2. Examples of entrepreneurships which use the natural resources of America are:
    a. People who live near oceans and lakes could rent boats to people who like to fish.
    b. People who live near rivers could rent floats for people to use.
    c. People who own sandy land could sell the sand to builders.
    d. People who own a large forest could sell trees for lumber.
3. America has many natural resources which the entrepreneur can use.

B. Entrepreneurs can work and open almost any business they choose.

1. American people are not told by the government what jobs they must do.
2. People who want to become entrepreneurs in America are not told by the government which businesses they can and cannot begin.
3. Entrepreneurs can hire people to help them in the entrepreneurship.

C. Entrepreneurs in the United States can make a profit.

1. Entrepreneurs are rewarded for their hard work by making a profit.
2. Entrepreneurs can keep their profit in free economic systems.
3. In America people can work and make much money.

ENTREPRENEURS IN AMERICA

I. All economic systems are alike in four ways.

A. All economic systems have natural resources.

B. People in economic systems have many things that they want and need.

C. People in economic systems must work to get what they want and need.

D. Economic systems must make products and services so that people can work and have the things they need.

II. Entrepreneurs in America can use the natural resources.

III. Entrepreneurs want and need many things to help make their lives happy.

A. Entrepreneurs want to be economically free.

1. Entrepreneurs do not want to worry about not having enough money to get what they want.
2. Entrepreneurs do not want to worry about not having enough money to pay their bills.
3. Entrepreneurs think they can do better economically by owning their own businesses.

B. Entrepreneurs want to be economically efficient.

1. Entrepreneurs like to be paid for what they do.
2. Entrepreneurs like to get their work done.

- a. Entrepreneurs will work many hours.
- b. Entrepreneurs will work for a few hours.

3. Entrepreneurs like to do good work but do not like to waste time or money.

C. Entrepreneurs want to be able to grow economically.

1. To make much money
2. To make their businesses larger
3. To have more

D. Entrepreneurs want to be economically secure.

1. People who work in some businesses worry about losing their jobs.
2. Some people become entrepreneurs because they want to have some kind of work if they were to lose their jobs.
3. Entrepreneurs can decide for themselves if they want to quit their businesses or keep them going.

E. Entrepreneurs want to be justly treated economically.

1. Many businesses make much money but only share a small amount of the profit with the people who work for the business.
2. People like to be paid for what they do.
3. Entrepreneurs may start their own businesses because other people do not pay them much money.
4. Entrepreneurs start their own businesses because they want to be paid for what they do.

F. Entrepreneurships help entrepreneurs to meet their economic goals.

1. To have money to pay the bills
2. To have money to buy the things they want
3. To have money to help other people
4. To have money during retirement years
5. To have money to put children through school

IV. Entrepreneurships help entrepreneurs use all of their skills.

A. Organizing skills

B. Communication skills

C. Decision-making skills

V. Many people in America are entrepreneurs.

A. The free enterprise economic system allows people to become entrepreneurs.

1. The government uses the products and services of entrepreneurs.
2. The government provides services for entrepreneurs to use.
   - a. Highways
   - b. Law enforcement
3. The government protects the people who buy goods and services.
   - a. By making sure the products and services are safe
   - b. By providing information to people
4. The government protects free enterprise.
   - a. Monopolies are not allowed.
   - b. Entrepreneurs can start their own businesses.

B. Many people in America work in small businesses.

1. Ninety-seven percent of the businesses in America are small businesses.
2. One in eight people is self-employed.
3. Fifty-six percent of the people work for small businesses.
4. You can be an entrepreneur.

VI. Entrepreneurs help America to grow.

A. Entrepreneurs help bring new products into the market place.

B. Entrepreneurs help create competition.

   1. Competition helps to keep prices low.

   2. Competition helps to make products and services better.

   3. Competition helps to create new and better products and services.

C. Entrepreneurs help the economy to grow.

   1. Entrepreneurs make more money.

   2. Entrepreneurs spend their money on other products and services.

   3. The free enterprise economic system grows when money is earned and spent.

VII. Anyone can become an entrepreneur in America.

A. The American free enterprise system lets people use their abilities.

B. The American free enterprise system lets people set high economic goals.

C. An entrepreneur's economic goals can be reached in the American free enterprise system.

D. Everyone should use the American free enterprise system to reach their economic goals.

TRAITS OF ENTREPRENEURS

I. Entrepreneurs have many traits that help make their businesses successful.

A. Not all entrepreneurs have the same traits.

B. They will be strong in some traits and weak in others.

C. Entrepreneurs can make their weak traits stronger.

   1. By knowing their weak areas

   2. By talking to others who have strong traits

   3. By doing jobs that use the weak traits

D. An entrepreneur may not want to make his/her weak traits stronger.

   1. A business partner may be strong in that area.

   2. Someone can be hired who is strong in that area.

II. Traits of Entrepreneurs

A. Entrepreneurs are self-starters.

   1. Entrepreneurs do not need to be told over and over what to do.

   2. They have goals to reach.

   3. Entrepreneurs are often working when other people have stopped.

B. Entrepreneurs like people.

   1. The buying and selling of products depends on how well the entrepreneur gets along with others.

   2. Entrepreneurs who do not like working with the public will not have a successful business.

   3. Entrepreneurs help consumers to get what they want.

   4. Consumers go to entrepreneurs to get what they want.

C. Entrepreneurs have leadership traits.

   1. Entrepreneurs have ideas about how to do something.

   2. They can get other people to believe in their ideas.

   3. Entrepreneurs communicate well with other people.

   4. Entrepreneurs are able to coordinate many activities in order to perfect a task.

D. Entrepreneurs like to see work finished.

   1. They may work long hours to finish a job.

   2. Entrepreneurs know that a job that is never finished will not help them to get other work.

   3. They can take pride in a job that is completed.

E. Entrepreneurs work hard to reach their goals.

   1. They are persistent.

   2. Entrepreneurs believe that working hard will help obtain their goals.

F. Entrepreneurs make plans before starting a job.

   1. They are economically efficient.

   2. Entrepreneurs do not like to waste time.

   3. They like to see work completed.

G. Entrepreneurs can make quick decisions that are wise.

   1. A quick decision that is wise may help an entrepreneur to get a job.

   2. An unwise quick decision may keep an entrepreneur from getting a job.

   3. Entrepreneurs make wise decisions because:

      a. They have a plan.

      b. They have an economic goal.

      c. They know what they want.

      d. They know what they can do.

H. Entrepreneurs can be trusted.

   1. Because they live in the community

      (NOTE: An entrepreneur may work or sell products to people whom he/she knows. Because the entrepreneur is accessible, he/she must be able to be trusted.)

   2. Because they complete the jobs that are started

   3. Because they work hard

   4. Because they are economically just in their dealings with the people

I. Entrepreneurs follow through on their decisions.

   1. They complete a task that has been started.

   2. People trust entrepreneurs to do what they say they will do.

   3. Other people make demands upon the entrepreneur.

      a. Consumers

      b. Employees

      c. Family

J. Entrepreneurs have much energy.

   1. Entrepreneurs often work many hours.

   2. Entrepreneurs work with many people.

   3. Entrepreneurs do many types of jobs during the day.

      a. Physical work

      b. Public relations

      c. Making decisions

K. Entrepreneurs are independent.

   1. They often work by themselves.

   2. Entrepreneurs may not have the support of friends and family in their work.

   3. Entrepreneurs are excited about what they can do in their own business.

L. Entrepreneurs take risks.

   1. Entrepreneurs do not know if their businesses will succeed.

   2. They may spend much money and not make any profit.

   3. Entrepreneurs believe that if a person does not take a risk, he/she can never know what might be achieved.

M. Entrepreneurs like responsibility.

   1. Entrepreneurs like working for themselves.

   2. They like making decisions.

   3. Entrepreneurs like knowing that the success or failure of a business depends on their abilities.

4. They have more faith in their own abilities than in someone else's.

N. Entrepreneurs communicate well with others.

1. They know that the success of their business depends upon others buying their products and/or services.

2. Entrepreneurs need the support of others to help finance the business.

3. Entrepreneurs may have partners with whom they must get along.

O. Entrepreneurs have self-confidence.

1. They believe in themselves.

2. Entrepreneurs believe in their business.

3. Entrepreneurs know that, even if a business fails, they will have learned or gained a valuable experience.

(NOTE: An entrepreneur's self-confidence may be low when he/she first starts the business. There are always doubts. Entrepreneurs take risks, work hard, and help their business succeed. Entrepreneur's self-confidence grows.)

P. Entrepreneurs are flexible.

1. An entrepreneur may need to change his/her plans in order to help the business grow.

2. Entrepreneurs look at many solutions to their problems.

3. They realize that other people may know how to do something better.

4. Entrepreneurs can choose the best way to do something, even if it is different from how they want to do it.

BECOMING AN ENTREPRENEUR

I. Self-appraisal is important for beginning entrepreneurs.

A. Knowing your traits or abilities can help you to know your strengths or weaknesses.

B. Knowing your strengths or weaknesses will help the chosen business to be successful.

1. Your interest in a certain business does not mean that it will be successful.

2. You must be able to perform, or find a way to perform, the duties of the new business.

II. Self-appraisal will help you to decide which business to start.

A. Self-appraisal may be started by asking yourself many questions.

1. What business do I know the best?

2. What business am I willing to learn?

3. What can I add to the business to make it unique or different from those that now exist?

4. What are my reasons for starting a business?

5. Am I willing to work long hours to get what I want?

B. Self-appraisal may involve getting the opinions of others.

1. What things do other people think that I do well?

2. Do the reasons I give for starting a business make sense to others?

(NOTE: You will need to hear what other people say about your abilities in owning a business. One of the real abilities or traits of an entrepreneur, however, is doing what other people think is impossible. You must believe in yourself.)

III. Self-appraisal will help you to evaluate your economic goals.

A. Do I want to own my own business?

B. Do I want to be my own boss?

C. Do I want to make more money?

(NOTE: If the desire to be your own boss or the need to make more money is great enough, you can develop your traits and open a business. Sometimes being treated unjustly economically, having too many bills, or believing that you can do a better job will help encourage you to become an entrepreneur.)

IV. Self-appraisal is important because you are your business' greatest asset.

A. In a large business, a person can be easily replaced.

B. In a small business, the business will only be as good as the entrepreneur.

1. If the entrepreneur is lazy, the business will not run well.

2. If the entrepreneur does not like other people, the products and services will not be sold.

3. If the entrepreneur does not make plans, the economic goals will not be met.

V. Self-appraisal will help you to become an entrepreneur.

A. If you know your strengths, you can use them to start or build up your business.

B. If you know your work traits, you can work to make them strong.

C. You may want to hire someone who has the strong traits that you do not have.

1. Someone poor in math can hire someone to keep his/her fnancial records.

2. Someone with poor management skills but who has good ideas may want to hire someone to develop his/her ideas.

STARTING YOUR OWN BUSINESS

I. There are general areas you should know about.

A. Know something about the business.

B. Know the amount of money or capital it will take to start a business.

C. Be aware of the importance of location.

D. Have a way to manage your inventory.

E. Have good credit policies.

F. Limit the amount of money that you take out of the business.

G. Make plans for expanding your business.

II. Steps to take in starting a new business.

A. Establish a checking account with a commercial bank.

B. Decide if you need a business partner.

C. Draw up a partnership agreement if you have a partner.

D. Obtain a business loan if needed.

E. Study the regulations which apply to the type of business you wish to start:

1. Federal regulations

a. Wages

b. Health laws

c. Fair trade

2. State regulations

a. Licenses

b. Permits

3. County or city regulations

a. Zoning

b. Inspection requirements

c. Permits

d. Licenses

G. Obtain insurance to cover your business.

H. Obtain information about taxes.

I. Set up a record keeping system.

J. Decide if you need to hire employees.

  1. Set up employment policies.

  2. Decide on skills required.

K. Inform the public about your business by advertising.

RISKS INVOLVED IN STARTING A BUSINESS

I. Financial risk

  A. In most cases, you will have to invest all of your personal savings.

  B. Over 70 percent of all bankrupticies in business involve businesses with less than $100,000 in liabilities.

II. Risk of failure

  A. Fifty percent of all new businesses fail within the first two years of operation.

  B. Seventy percent of all new businesses fail within five years.

III. Risk to your career

  A. If you are currently employed in one occupation, you will have to quit your job to start a business.

  B. If your business does not succeed, it may be difficult to return to the other occupation and obtain a job.

IV. Personal risk

  A. You must spend time away from your family.

  B. You will have less time for social activities.

REWARDS YOU CAN EXPECT

I. If your business is a success, you may be able to make more money than you could have working for someone else.

II. It is a way to feel good about yourself from having used your own talents and having been a success doing it.

TYPES OF ECONOMIC SYSTEMS

I. Capitalistic

  (NOTE: Free enterprise system)

  EXAMPLE: United States

  A. Based on private ownership

  B. Allows competition

  C. Goods produced for the purpose of gaining profit

  D. Can work only in a democracy

II. Socialistic

  EXAMPLE: Great Britain

  A. Depends heavily on government to make economic decisions

  B. Public interest more important than private profit

  C. Government control of major industries and resources

    EXAMPLE: The government medicine and medical services in England.

  D. Allows some private ownership

  E. Democracy can be a part of a socialist economy.

III. Communistic

  EXAMPLE: Russia, Red China

  A. All production owned by the government

  B. Government ruled by a single party

  C. Allows no private ownership

  D. Democracy cannot be a part of a communistic economy.

    (NOTE: Communism is also considered a political system.)

OUR AMERICAN ECONOMIC SYSTEM

I. Major factors in our free enterprise economic system

  A. Ownership of private property

    1. A legal right to own personal property

    2. The right to own factories, offices, and stores

    3. The right to own natural resources

B. Profit

1. Individuals want to use their resources to earn money.
2. Profit leads to economic development.
3. Profit can make producers want new jobs.
4. Profit can make producers want to do their jobs well.

C. Rights of the people

1. To develop own business
2. To run the business
3. To operate in an open economy
4. To make a profit from the business

(NOTE: Free enterprise is the basis of a capitalistic economic system. However, exceptions to these rights can be made when goods and services are critical to the welfare of the nation.)

D. Competition

1. The development of new or improved goods and services
2. Efficient use of resources
3. Opening of more new businesses
4. Price reductions
5. New jobs

E. Free Market

1. The market is not under government control.
2. People may produce what they think they can sell.
3. People may make profits, but also must accept losses that may occur.
4. The consumer has a broad selection from which to choose.

THINGS THAT KEEP THE FREE ENTERPRISE SYSTEM IN BALANCE

I. The law of supply and demand

A. Determines how much of the goods and services are produced

B. Determines how goods and services are distributed

C. Affects the price of goods and services

D. Affects employment in our economy

II. Changes in our economy

A. The way people spend their money

B. Creation of new technologies to improve goods and services

C. Amount of money available for investment

D. Crop failures

E. Wars

F. Confidence of the people in our economy

(NOTE: Confidence of the people in the economy is shown when spending is up because people feel good about the future.)

III. Employment

A. Natural growth and development cause major shifts in employment.

B. Changes in demand for goods and services result in unemployment for various periods of time.

C. New jobs are caused by shifts in the demand for goods and services.

D. The work force must continually adjust to these changes in demand.

E. Business, government, and labor organizations help people adjust to changing job conditions.

(NOTE: Employment is the key factor in a balanced ecomony.)

ACTIVITY SHEET I--WORD FIND

A. Directions: Find the words that best fit the descriptions at the bottom this page. Circle your answers.

X	K	L	O	R	U	S	M	U	B	D	C	T	Q	R	T	O	N	M	V
R	M	B	X	S	N	I	V	S	O	C	I	A	L	I	S	M	B	U	S
M	C	D	M	B	R	S	L	K	G	A	B	D	E	N	S	O	V	N	O
N	A	E	N	S	L	K	G	H	V	I	N	G	R	I	E	K	S	L	N
L	P	B	D	P	R	O	F	I	T	A	G	B	N	K	G	A	Y	U	P
P	I	G	L	K	N	S	T	M	O	L	G	U	O	F	X	G	O	L	M
R	T	B	C	D	K	L	N	G	B	V	M	T	S	G	O	T	V	U	R
Z	A	E	A	C	D	B	E	L	G	M	K	B	D	L	Y	R	O	X	L
M	L	B	G	H	L	M	C	K	O	R	T	Z	O	N	L	V	C	O	V
V	I	E	G	A	G	B	L	C	F	G	I	N	M	K	H	I	G	E	S
O	S	U	P	P	L	Y	A	B	A	I	H	O	H	B	K	C	B	L	N
P	M	V	L	R	T	S	R	N	G	C	L	K	M	C	G	M	D	K	C
K	G	M	K	B	D	E	T	E	E	A	G	P	I	G	A	L	E	M	A
H	S	R	M	L	V	K	L	T	L	K	R	E	S	O	U	R	C	E	S
G	Z	N	T	X	U	R	V	K	E	L	D	A	G	K	O	L	S	O	B
I	B	D	E	H	R	X	N	I	O	M	E	C	M	T	S	R	T	R	D
O	A	D	E	M	A	N	D	G	N	G	H	B	S	V	L	M	V	T	R
R	N	S	R	V	Z	Y	A	C	D	K	M	O	Z	T	U	C	D	E	A
V	X	Z	O	L	U	E	B	E	N	T	E	R	P	R	I	S	E	B	K
T	S	V	U	W	L	K	G	L	K	S	A	S	I	U	O	E	S	L	M

1. Economic and political system in which the people privately own goods and investments and where the production, distribution, and sale of goods is based on competition in a free market.

2. All people 16 years or older employed as civilians laboring more than 15 hours a week for wages and those workers who are unemployed and the armed forces make up the labor ______________.

3. Capital __________________ are the basic "tools" used to change raw materials into goods and services.

4. Amount of goods and services a customer will want to buy

5. Free ________________ is the right to start and manage a business, compete with other businesses, and seek a profit, providing it is not forbidden by law.

6. Applying service for the practical purpose of producing more and better goods and services for industrial uses

7. Amount of goods and services that will be offered for sale

8. Money remaining after all costs of operating a business are paid

9. Economic and political system in which the government owns and controls all private and state means of production and distributes economic goods among the people as needed; no private or state ownership exists in a communistic society.

10. Economic and political system in which there is collective or government ownership and control of most means of production and distribution of goods

ACTIVITY

B. Match the following items with their definitions by placing the correct letter in the blank at the left.

_____ 1. Achievement

_____ 2. Capital

_____ 3. Courage

_____ 4. Creativity

_____ 5. Curiosity

_____ 6. Entrepreneurship

_____ 7. Independence

_____ 8. Inventory

_____ 9. Licenses

_____ 10. Partnership

_____ 11. Permit

_____ 12. Personality traits

_____ 13. Regulation

_____ 14. Self-confidence

_____ 15. Wages

_____ 16. Zoning

a. usually refers to the amount of money you earn during an hour

b. a paper, card, etc. showing permission

c. freedom from the control of others

d. a rule of law that regulates

e. ability to create, having imagination and ability

f. something achieved by skill, work, courage, etc.

g. the quality of being able to control one's fear; bravery

h. a section of a city set apart by law for a particular use, as for homes or for business

i. sure of oneself, confident of one's own ability

j. a strong feeling of wanting to know or learn

k. the organizing, managing, and operating of a small business by an individual

l. money or property, especially when used in business to make more money

m. a paper, card, etc. showing that one is permitted by law to do something

n. a complete list of goods or property; the stock of goods on hand

o. all the special qualities which make a person different from other people

p. a business firm made up of two or more partners

ACTIVITY SHEET 2--STARTING YOUR OWN BUSINESS

Directions: Have you ever considered having your own business? Do you think it would be easier or harder working for someone else? This activity will help you experience both the good and bad points of being an entrepreneur. First, consider your classmates as your business partners. Can you and your partners think of a product that can be sold in your school, or perhaps a service you and your partners can provide for others? If so, you are on the right track to starting your own business and being an entrepreneur! By the way, below is a list of steps to follow for small business success. You should realize, however, that if you were starting an actual business, there would be many more steps to follow.

STEPS FOR SMALL BUSINESS SUCCESS

1. Decide what type of product or service you will sell.

2. Decide approximately how many people you expect will buy your product or want the service you are willing to provide.

3. Decide if you are selling a product and whether you will make it or buy it from another company.

4. Decide what supplies will be needed to start your business.

5. Decide how much money will be needed to start your business.

6. Decide where you will get the money needed to start your business.

7. Figure the amount you will charge for your product or service in order to make a profit.

8. Decide when and where you will sell your product or provide your service.

9. Make sure that both the time and place you are selling your product or providing your service are convenient for others.

10. Agree on the name of your business

11. Plan how you will advertise.

12. Decide how and who will keep track of the books. (Inventory, money paid out, money taken in, etc.)

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ACTIVITY SHEET 3--AM I AN ENTREPRENEUR?

Directions: Under each question, check the answer that says what you feel or comes closest to it. Be honest with yourself.

Are you a self-starter?

____ I do things on my own. Nobody has to tell me to get going.

____ If someone gets me started, I keep going all right.

____ Easy does it. I don't put myself out until I have to.

How do you feel about other people?

____ I like people. I can get along with just about anybody.

____ I have plenty of friends--I don't need anyone else.

____ Most people bother me.

Can you lead others?

____ I can get most people to go along when I start something.

____ I can give orders if someone tells me what we should do.

____ I let someone else get things moving. Then I go along if I feel like it.

Can you take responsibility?

____ I like to take charge of things and see them through.

____ I'll take over if I have to, but I'd rather someone else be responsible.

____ There's always some eager beaver around waiting to show how smart he/she is. I just take things as they come.

How good a worker are you?

____ I can keep going as long as I am needed. I don't mind working for something I want.

____ I'll work hard for awhile, but when I've had enough, that's it!

____ I can't see that hard work gets you anywhere.

Can you make decisions?

____ I can make up my mind in a hurry if necessary. It usually turns out okay, too.

____ I can, if I have plenty of time. If I have to make up my mind fast, I think later that I should have decided the other way.

____ I don't like to be the one who has to decide things. I'd probably ruin it.

Can people trust what you say?

____ Yes, they can. I don't say things I don't mean.

____ I try to be honest most of the time, but sometimes I just say what is easiest.

____ What does it matter if the other person doesn't know the difference.

Can you stick with it?

____ If I make up my mind to do something, I don't let anything stop me.

____ I usually finish what I start--if it doesn't get fouled up.

____ If it doesn't go well right away, I stop. Why beat your brains out?

How good is your health?

____ I never run down!

____ I have enough energy for most things I want to do.

____ I run out of energy sooner than most of my friends seem to.

Now count the checks you made.

____ How many checks are beside the first answer to each question?

____ How many checks are beside the second answer to each question?

____ How many checks are beside the third answer to each question?

If most of your checks are beside the first answer, you probably have what it takes to run a business. If not, you're likely to have more trouble than you can handle by yourself. Better find a partner who is strong on the points you are weak on. If many checks are beside the third answer, not even a good partner could make your business a success.

Source: The High School Student in the Working World. A Handbook for Counselors. Texas Education Agency, Austin, Texas, July, 1981.

ACTIVITY SHEET 4--THE NECESSARY PARTS

Directions: On a sheet of paper or poster board, draw a picture showing the three necessary parts of an economic system.

ACTIVITY SHEET 5--WORKING IN DIFFERENT TYPES OF ECONOMIC SYSTEMS

A. Below is a list of characteristics for the three types of economic systems. Identify each characteristic with the correct type of economic system by placing either a "Cap" for capitalism, "Soc" for socialsim, or "Com" for communism in front of each number.

____ 1. Public interest more important than private profit

____ 2. Goods produced for the purpose of gaining profit

____ 3. Allows no private ownership

____ 4. Democracy not a part of this economy

____ 5. Allows competition

____ 6. Democracy can be a part of this economy

____ 7. Depends heavily on government to make economic decisions

____ 8. Based on private ownership

____ 9. All production owned by the government

____ 10. Can only work in a democracy

B. In the United States, we work in a democratic, free enterprise economic system. Describe what it might be like to work in the economic systems found below.

Communist system

Socialist system

ACTIVITY SHEET 6--CREATING YOUR OWN ENTERPRISE

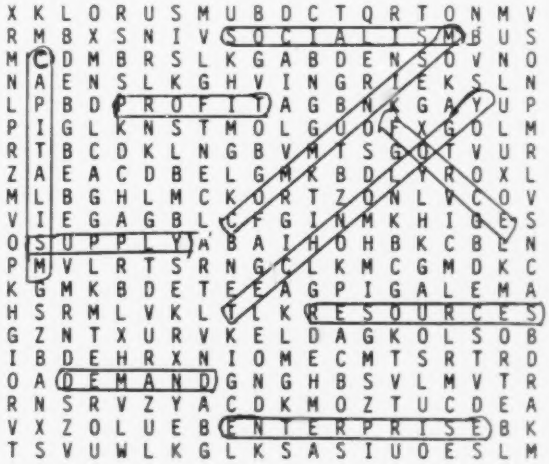
Directions: In our economic system (free enterprise), people may produce what they think will sell. Describe a product you think would sell (you may want to draw a picture), and then answer the following questions.

1. In what area(s) of the country will your product be sold?
2. In what type of place will your product be sold?
3. How many people will have a need or desire to purchase your product?
4. What will you charge for the product?
5. How much will it cost for you to make it?
6. What will be your profit per product?
7. How many people do you expect to employ to make the product?
8. Will it be an item that will go out of style, or that people would not like to buy after several years?
9. Will you manage the business?
10. Is there another product similar to yours on the market? If so, explain.

ANSWERS TO ACTIVITY SHEETS

ACTIVITY SHEET 1

A.



X	K	L	O	R	U	S	M	U	B	D	C	T	Q	R	T	O	N	M	V
R	M	B	X	S	N	I	V	S	O	C	I	A	L	I	S	M	B	U	S
M	C	D	M	B	R	S	L	K	G	A	B	D	E	N	S	O	V	N	O
N	A	E	N	S	L	K	G	H	V	I	N	G	R	I	E	K	S	L	N
L	P	B	D	P	R	O	F	I	T	A	G	B	N	X	G	A	Y	U	P
P	I	G	L	K	N	S	T	M	O	L	G	U	O	F	X	G	O	L	M
R	T	B	C	D	K	L	N	G	B	V	M	T	S	G	O	T	V	U	R
Z	A	E	A	C	D	B	E	L	G	M	K	B	D	L	Y	R	O	X	L
M	L	B	G	H	L	M	C	K	O	R	T	Z	O	N	L	V	C	O	V
V	I	E	G	A	G	B	L	C	F	G	I	N	M	K	H	I	G	E	S
O	S	U	P	P	L	Y	A	B	A	I	H	O	H	B	K	C	B	L	N
P	M	V	L	R	T	S	R	N	G	C	L	K	M	C	G	M	D	K	C
K	G	M	K	B	D	E	T	E	E	A	G	P	I	G	A	L	E	M	A
H	S	R	M	L	V	K	L	T	L	K	R	E	S	O	U	R	C	E	S
G	Z	N	T	X	U	R	V	K	E	L	D	A	G	K	O	L	S	O	B
I	B	D	E	H	R	X	N	I	O	M	E	C	M	T	S	R	T	R	D
O	A	D	E	M	A	N	D	G	N	G	H	B	S	V	L	M	V	T	R
R	N	S	R	V	Z	Y	A	C	D	K	M	O	Z	T	U	C	D	E	A
V	X	Z	O	L	U	E	B	E	N	T	E	R	P	R	I	S	E	B	K
T	S	V	U	W	L	K	G	L	K	S	A	S	I	U	O	E	S	L	M

B.
1. f
2. l
3. g
4. e
5. j
6. k
7. c
8. n
9. m
10. p
11. b
12. o.
13. d
14. i
15. a
16. h

ACTIVITY SHEETS 2-4

Evaluated to the satisfaction of the instructor.

ACTIVITY SHEET 5

A.
1. Soc
2. Cap
3. Com
4. Com
5. Cap
6. Soc
7. Soc
8. Cap
9. Com
10. Cap

B. Evaluated to the satisfaction of the instructor.

ACTIVITY SHEET 6

Evaluated to the satisfaction of the instructor.

ENTREPRENEURSHIP

UNIT TEST

A. Match the terms with their definitions by placing the correct letter in blanks at the left.

____ 1. Manage

____ 2. S.B.A

____ 3. Sole-proprietor

____ 4. Entrepreneurship

____ 5. Small Business

____ 6. Entrepreneur

____ 7. Stockholder

____ 8. Responsible

____ 9. Business

____ 10. Not dominant in its field

a. a place where products and services are sold.

b. a new business started by one or more people

c. a person who starts or buys a business

d. being responsible for a business

e. making decisions and deciding how something is to be done

f. Small Business Administration

g. a person who is the only owner of a business

h. the sales of a business being only a small amount of the total sales in its field

i. a person who owns part of a business

j. a business that is independently owned, independently managed, and not dominant in its field.

B. Fill in the blanks in each sentence using the following words.

traditional entrepreneurs
new
independently

modern entrepreneurs
sole proprietor
entrepreneur

1. Entrepreneurships are ________________ businesses.

2. A ________________ is a person who is the only owner of an entrepreneurship.

3. Entrepreneurships are ________________ owned.

4. An ________________ is a person who starts an entrepreneurship.

5. ________________ are people who start a business to make and sell new products and services.

6. ________________ ________________ are people who start or buy a business, but the products and services are not new.

C. Answer the following statements true or false by placing a T for True or F for False in the blanks at the left.

____ 1. One of the main reasons people become entrepreneurs is to be their own boss.

____ 2. One of the main reasons people become entrepreneurs is to earn more money.

____ 3. New businesses are easy to begin.

____ 4. It is hard to quit an entrepreneurship because there are more products to get rid of.

____ 5. Entrepreneurs cannot take pride in owning their businesses.

____ 6. Entrepreneurs can use many of their skills and talents in their businesses.

____ 7. Entrepreneurs do not get to make decisions.

____ 8. Entrepreneurs can get to know the people for whom they work.

____ 9. Entrepreneurs give poor service to the people for whom they work.

____ 10. Entrepreneurs can get to know the people that work for them.

D. Place an X to the left of each statement that is a reason people do not want to become entrepreneurs.

____ 1. They may have trouble getting the money needed to open a business.

____ 2. They may not know how to find the help that they need.

____ 3. They have much responsibility.

____ 4. They may need to pay for all the cost when starting a business.

____ 5. They do not know what is going to happen.

E. Answer the following statements true or false by placing a T for True or an F for False in the blanks at the left.

____ 1. Anyone can be an entrepreneur.

____ 2. There are many entrepreneurs in the United States.

____ 3. Not many people work for entrepreneurs.

____ 4. Entrepreneurships seldom go out of business.

____ 5. People need to learn how to keep their businesses going.

F. Complete the following statements by selecting the correct choice below. Place the correct letter in the blank at the left.

____ 1. Entrepreneurship is:

  a. the need for achievement
  b. the organizing, managing, and operating of a small business
  c. the need for independence

____ 2. Personality traits of an entrepreneur include:

  a. need for achievement
  b. need for independence
  c. self-confidence
  d. high level of activity
  e. courage, curiosity, and creativity
  f. all of the above

____ 3. Who should start their own business?

  a. someone who cannot keep a job working for others
  b. someone who is afraid of taking chances
  c. someone who wants to control his/her own destiny

____ 4. The reasons for starting your own business might include:

  a. It might be a way to make more money than you could if you worked for someone else.
  b. It would give you the chance to do something different.
  c. You might like being your own boss.
  d. It would give you the chance to discover if you have the ability to do something on your own.
  e. It would allow you to help society by providing new services.
  f. All of the above.

G. Answer the following statements by placing a T for True or an F for False in the space at the left.

____ 1. One of the personality traits needed in an entrepreneur is self-confidence.

____ 2. Entrepreneurs have no need to control their own desitny.

____ 3. As an entrepreneur, you can use your own ideas.

____ 4. Learning to accept the outcome of your actions is the by-product of being an entrepreneur.

H. Answer the following statements true or false by placing a T for True or an F for False in the space at the left.

____ 1. Location has little to do with the success of a business.

____ 2. Establishing good credit policies is important in operating a business.

____ 3. If the business is yours, you can spend all the money you want out of the business account.

____ 4. There are no government regulations for new businesses.

____ 5. If you hire employees, it is important to set up employment policies.

____ 6. If you and your partner are good friends, there is no need to set up a partnership agreement.

____ 7. In most cases you will have to invest all of your personal savings.

____ 8. Twenty-five percent of all new businesses fail within the first two years of operation.

____ 9. There is little risk involved in starting a new business.

____ 10. The only reward you will have if your business is a success is the money you have made.

____ 11. There are many types of businesses--some provide services; others produce products.

____ 12. It is important that you know everything about the business before you start it.

____ 13. Professionals are ready to help you in areas you may not know about.

____ 14. You will have to do all your package design and packaging yourself.

____ 15. Currently, conditions are good for starting a new business.

____ 16. Many people are not satisfied with big businesses.

I. Match the three major economic systems in operation today with the statements which best define them by placing the correct letter in the blanks at the left.

____ 1. In this system, the government is ruled by a single party, all production is owned by the government, and there can be no private ownership.

____ 2. In this system, some private ownership is allowed, democracy can be part of the system, there is government control over the major industries and resources, and public interest is more important than private profit.

____ 3. This system is based on private ownership, competition is allowed, and goods are produced for the purpose of gaining profit; it can only work in a democracy.

a. Socialism

b. Capitalism (Free enterprise)

c. Communism

J. Answer the following statements True or False by placing a T for True or an F for False in the space at the left.

____ 1. A socialistic economic system depends heavily on government to make decisions.

____ 2. Communistic economic systems allow some private ownership.

____ 3. A capitalistic economic system is based on private ownership.

____ 4. The government controls major industries and resources in a socialistic economic system.

____ 5. Democracy cannot be part of a socialist economy.

____ 6. Democracy can be part of a communistic economy.

____ 7. Public interest is more important than private profit in a socialistic system.

K. Identify the five major free enterprise factors in our economic system by completing the sentences, using the words listed below which describe the factor.

Profit
Free market
Ownership of private property
Rights of the people
Competition

1. When individuals want to use their resources to earn money, this is called ____________________________.

2. A right to develop your own business, run it, operate it in an open economy, and make a profit from it is called the ________________ in a free enterprise system.

3. In America, we have a legal right to own factories, offices, stores, and businesses; this is called ____________________________.

4. ______________________________ can create the development of new or improved goods and services.

5. In a ________________________, people produce what they think they can sell; they make profits, but also accept any losses that may occur.

L. Answer the statements below that describe things that keep our free enterprise economy in balance by writing T for True or F for False in the blanks at the left.

____ 1. Crop failures can cause a change in our economy.

____ 2. The law of supply and demand affects the price of goods and services.

____ 3. Employment is not that important to a balanced economy.

____ 4. New jobs are caused by shifts in the demand for goods and services.

____ 5. Creation of new technologies causes changes in our economy.

____ 6. The law of supply and demand affects the employment in our economy.

ANSWERS TO UNIT TEST

A.
1. d
2. f
3. g
4. b
5. j
6. c
7. i
8. e
9. a
10. h

B.
1. new
2. sole proprietor
3. independently
4. entrepreneur
5. traditional entrepreneurs
6. modern entrepreneurs

C.
1. T
2. T
3. T
4. F
5. F
6. T
7. F
8. T
9. F
10. T

D.
1. x
2. x
3. x
4. x
5. x

E.
1. T
2. T
3. F
4. F
5. T

F.
1. b
2. f
3. c
4. f

G.
1. T
2. F
3. T
4. T

H.
1. F
2. T
3. F
4. F
5. T
6. T
7. T
8. F
9. F
10. F
11. T
12. F
13. T
14. F
15. T
16. T

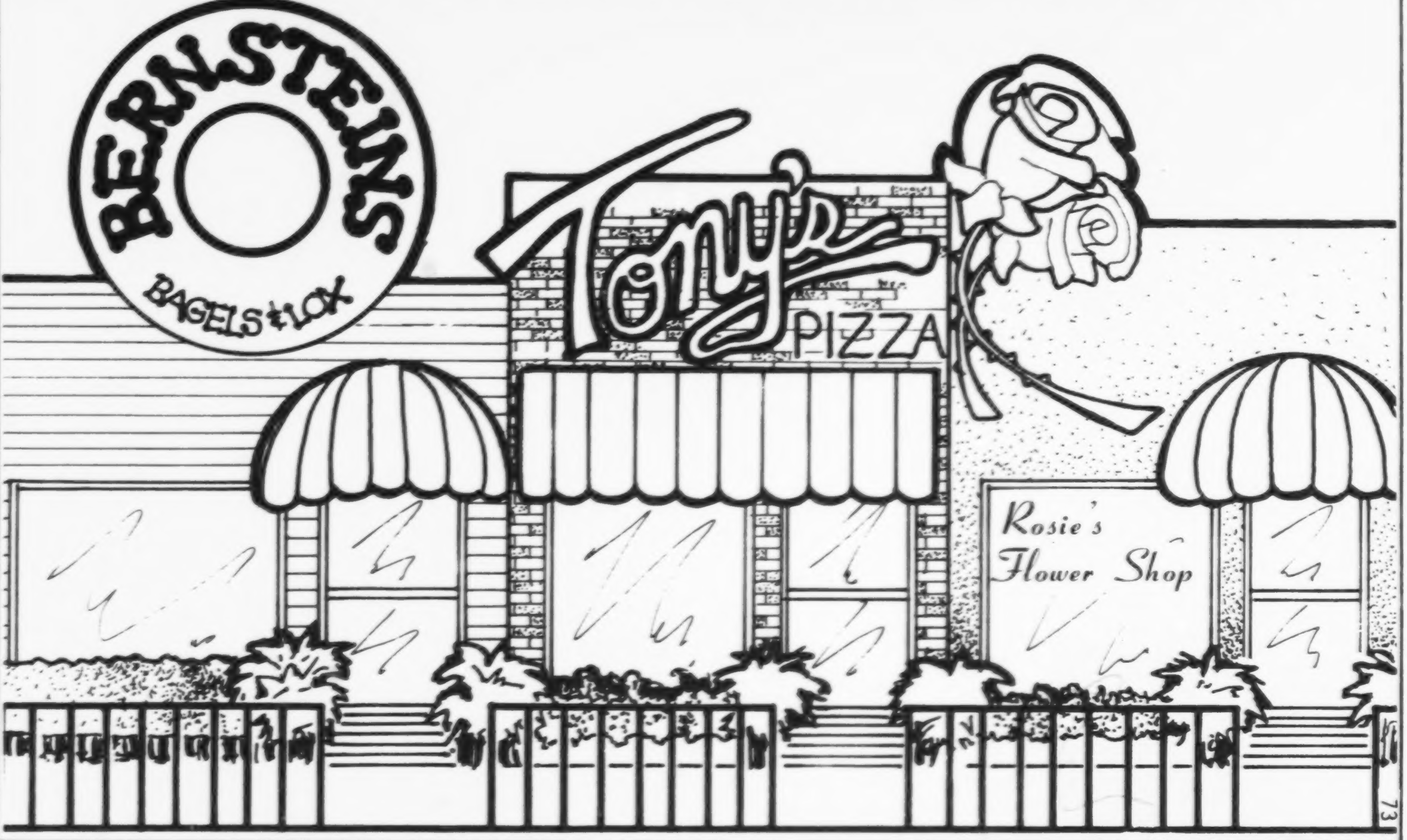
I.
1. c
2. a
3. b

J.
1. T
2. F
3. T
4. T
5. F
6. F
7. T

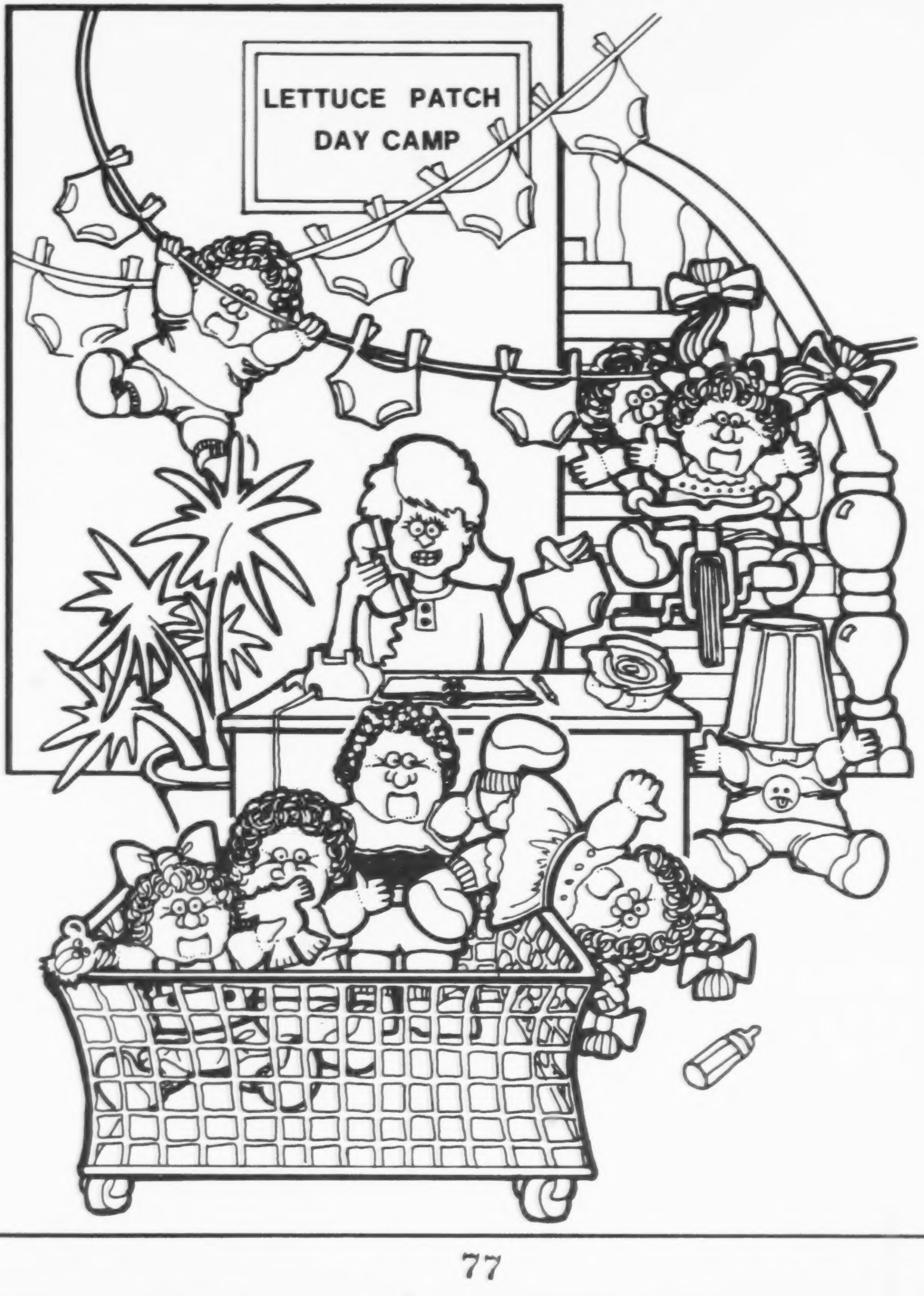
K.
1. profit
2. rights of the people
3. ownership of private property
4. competition
5. free market

L.
1. T
2. T
3. F
4. T
5. T
6. T

ENTREPRENEURSHIPS ARE INDEPENDENTLY OWNED AND INDEPENDENTLY MANAGED


BERNSTEINS
BAGELS & LOX
Tony's
PIZZA
Rosie's Flower Shop

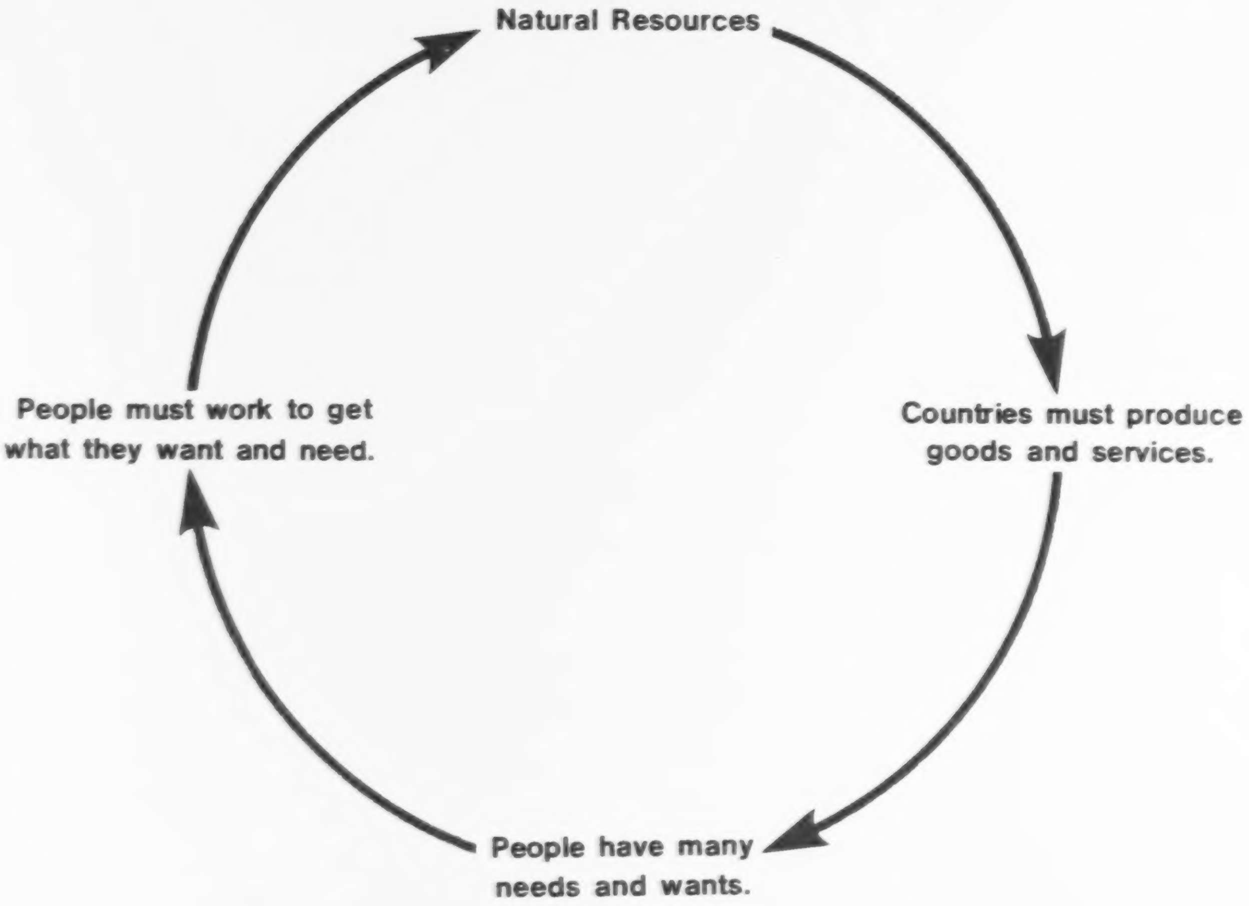
ENTREPRENEURSHIPS MAY BE STARTED FROM THE HOME


LETTUCE PATCH
DAY CAMP

SOME EXAMPLES OF ENTREPRENEURSHIPS

1. Farm equipment repair
2. Tree trimming service
3. A garden center
4. Fertilizer and pesticide service
5. Dairy farming
6. Apparel store
7. Travel agency
8. Bicycle store
9. Flower and plant store
10. Inn keeping
11. Nursing
12. Wheelchair transportation
13. Health spa
14. Telephone answering service
15. Secretarial service
16. Bookkeeping
17. Software design
18. Word processing
19. Restaurant
20. Day care
21. Housekeeping
22. Sewing
23. Home attendant
24. Security guard
25. Pest control
26. Energy specialist
27. Hair stylist
28. Auto repair
29. Welding
30. Electrician
31. Carpentry
32. Plumbing
33. Air conditioning

WAYS IN WHICH ALL ECONOMIC SYSTEMS ARE ALIKE



Natural Resources

Countries must produce goods and services.

People have many needs and wants.

People must work to get what they want and need.

SUCCESSFUL EMPLOYMENT

75.81(a)(2) Concepts and skills related to successful employment. The student shall be provided opportunities to:

(c) Develop the ability to take and follow both oral and written directions

(d) Practice punctuality and dependability

(e) Observe rules and standards of the work place

(f) Demonstrate an ability to work with others harmoniously

(g) Develop responsibility and the ability to follow through on assigned tasks

(h) Exhibit productive work habits and attitudes

SUCCESSFUL EMPLOYMENT

UNIT OBJECTIVE

The student should be able to identify important factors in job success, productive work habits, attitudes, and personal development.

SPECIFIC OBJECTIVES

1. Identify terms associated with on-the-job relations.
2. Discuss the importance of observing the rules and standards of the work place.
3. Define ways to work harmoniously with others.
4. Identify productive work habits and attitudes, including punctuality, dependability, following directions, and taking responsibilities.

TEACHER ACTIVITIES

1. Preview the unit and review objectives and localize and individualize the material to meet the needs of your program.
2. Design a bulletin board on successful employment.
3. Arrange for a guest speaker to discuss on-the-job relations.
4. Prepare the slide/tape presentation, Human Relations in Business.
5. Secure copies of company policies and procedures manuals from local businesses.

STUDENT ACTIVITIES

1. Participate in class discussion.
2. Read Unit Overview.
3. Look up terms and definitions in dictionary.
4. Complete Unit Activity Sheets.
5. Role play employer-employee relationship situations.

EVALUATION

ESTIMATED COMPLETION TIME

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the Resources Section

RESOURCES

BASIC JOB SKILLS PROGRAM - THE LANGUAGE OF WORK
Cassettes, transparencies, text, teacher manual .
Career Aids, Inc.
20417 Nordhaff Street, Dept. C-7
Chatsworth, CA 91311

CLERICAL OFFICE PROCEDURES, 5th ed.
Southwestern Publishing Company
Cincinnati

COMMUNICATION SKILLS FOR SUCCEEDING IN THE WORLD OF WORK
4 cassettes, activity, teacher guide
Career Aids, Inc.

COMMUNICATIONS IN ACTION
Text/Workbook
Southwestern Publishing Company

COMMUNICATIONS: YOUR BRIDGE TO OTHERS
1 disk, 2 text
Apple II, IIe, or IIc, IBM PC
Career Aids, Inc.

ENTERING THE WORKING WORLD
4 Sound Filmstrips
Glencoe Publishing Company
8301 Ambassador Row
Dallas, TX 75247

ENTERING THE WORLD OF WORK
Film and cassette
Career Aids, Inc.

HUMAN RELATIONS IN BUSINESS
Southwestern Publishing Company

HUMAN RELATIONS IN BUSINESS, STUDENT MANUAL
Agricultural Education Services
Ohio State University
Columbus

HUMAN VALUES IN THE CLASSROOM
Hart Publishing Co., NC
New York City

JOB-RELATED INSTRUCTION FOR COOPERATIVE PART-TIME TRAINING
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

KEEPING THE JOB
Milliker Vocational Education Teaching Aid (MV0020)

MANAGEMENT: CONCEPTS AND PRACTICES
Allyn and Bacon, Inc.
Boston

ORGANIZATION AND MANAGEMENT: A CONTINGENCY APPROACH
Prentice Hall
Englewood Cliffs, NJ

PERSONALITY DEVELOPMENT FOR WORK, 4th ed.
Southwestern Publishing Company

PSYCHOLOGY HUMAN RELATIONS AND MOTIVATION, 5th ed.
Gregg and Community College Division
McGraw-Hill Book Company
New York

SUCCEEDING IN THE WORLD OF WORK
Text and activity manual
Glencoe Publishing Company

WORK HABITS FOR JOB SUCCESS
1 disk with back-up
Apple II, IIe, or IIc, IBM PC
Career Aids, Inc.

75.81(a)(2)

OBJECTIVE: The student should be able to identify important factors in job success, productive work habits, attitudes, and personal development.

	MASTERY	NON MASTERY
1. ACTIVITY SHEET 1--THE IMPORTANCE OF A PROPER JOB ATTITUDE		
2. ACTIVITY SHEET 2--SHOWING A POSITIVE ATTITUDE		
3. ACTIVITY SHEET 3--SELECTING WORK CHARACTERISTICS		
4. ACTIVITY SHEET 4--EXPECTATIONS OF EMPLOYERS		
5. ACTIVITY SHEET 5--EXPECTATIONS OF EMPLOYEES		
6. ACTIVITY SHEET 6--ROLE-PLAYING EMPLOYER/EMPLOYEE RELATIONS		
7. ACTIVITY SHEET 7--MAKING FRIENDS AT WORK		
8. ACTIVITY SHEET 8--ATTITUDES THAT AFFECT CO-WORKERS		
9. ACTIVITY SHEET 9--ETHICAL CONDUCT		
10. ACTIVITY SHEET 10--DETERMINING COMPANY POLICIES AND PROCEDURES		
11. ACTIVITY SHEET 11--RESPONSIBLE, OR NOT?		
12. ACTIVITY SHEET 12--EXCUSES		
UNIT TEST		

PERFORMANCE CHART

I. INTRODUCTION

A. Have the students look up the terms in a dictionary or reference book for additional information.

B. Have a spelling test over the words so the student can become more familiar with them.

II. POSITIVE WORK HABITS AND ATTITUDES

Discuss the importance of a proper attitude, using information from the Unit Overview.

A. Use TM's 1 and 2 to promote class discussion.

B. Assign ACTIVITY SHEET 1--THE IMPORTANCE OF A PROPER JOB ATTITUDE and ACTIVITY SHEET 2--SHOWING A POSITIVE ATTITUDE.

III. EMPLOYER-EMPLOYEE RELATIONS

A. Discuss employee and employer expectations, using information from the Unit Overview.

B. Invite a guest speaker to visit the class to discuss employer expectations.

C. Use TM's 3, 4, 5, and 6 to promote discussion on employer expectations.

D. Assign ACTIVITY SHEETS 3, 4, and 5 to help students realize the positive qualities of employer and employee relationships.

E. Use TM's 7 and 8 to promote discussion on the importance of following directions.

F. Complete ACTIVITY SHEET 6--ROLE-PLAYING EMPLOYER/EMPLOYEE RELATIONS to reinforce the importance of empathy in on-the-job relations.

IV. GETTING ALONG WITH CO-WORKERS

A. Discuss the importance of getting along with co-workers and the essential personality traits necessary to do this.

B. Use TM's 9 and 10, along with information in the Unit Overview, to promote discussion on the characteristics of a good co-worker.

C. Assign ACTIVITY SHEETS 7 and 8.

V. COMPANY POLICIES AND PROCEURES

A. Obtain policies and procedures manuals from businesses in your community to use during the discussion of the unit.

B. Arrange for an employer to speak to the class regarding the different types of policies and procedures and their importance.

C. Discuss the purpose of policies and use examples to facilitate the discussion. Also, use the manuals obtained from local businesses to illustrate the discussion.

D. Complete ACTIVITY SHEET 10--DETERMINING COMPANY POLICIES AND PROCEDURES.

E. Ask the students to give their definition of loyalty.

F. List some of the things or people to whom the students have been loyal in the past.

G. Discuss why they were loyal to these particular things or people.

H. Have the students name some reasons why it is important to be dependable.

NOTES TO THE INSTRUCTOR

I. Let the students relate some experiences when being dependable was important.

J. Talk about the many definitions of honesty and explain how all aspects are related.

K. Explain to students that people develop habits of loyalty, dependability, and honesty that are hard to break.

L. Relate these qualities to job situations and how a worker shows these qualities.

VI. EVALUATION

A. The unit test may be given in sections or all at one time.

B. The unit test could also be used as an assignment or oral test for the student.

C. Evaluation questions for any material added to the unit could be added to the unit test.

D. Answers are based upon information covered in the unit.

E. For convenience of grading, add answer sheets to correspond to questions added to the test.

JOB SUCCESS

I. TERMS

Ambitious
Appropriate
Attitude
Authority
Confidential
Conscientious
Considerate
Cooperation
Criticism
Dependability
Disciplinary
Enthusiasm
Evaluation
Honesty
Impression
Initiative
Loyalty
Obligation
Offensive
Positive
Productivity
Reliability
Success
Tactful
Unique

II. IMPORTANCE OF A PROPER JOB ATTITUDE

A. The most important part in job success is a good attitude.

B. Many new workers lose their jobs because of a poor attitude.

C. Generally, your attitude shows your outlook on life.

D. Set goals and work toward them.

E. Attitude is shown by the way you act in the presence of others.

EMPLOYER AND EMPLOYEE EXPECTATIONS

III. WHAT EMPLOYEES EXPECT OF EMPLOYERS

A. Salary--An employer will pay an employee for the work done on a job.

B. Safe working conditions--An employer must provide reasonably safe working conditions. Federal laws will not allow persons under 18 to work in certain dangerous jobs.

C. Training--An employer should provide necessary on-the-job training in order for an employee to do a job.

D. Introduction--An employer should introduce a new worker to all employees with whom the person will be working.

E. Rules--An employer should explain in detail all business policies, rules, and regulations to new employees.

F. Changes--If changes are made to an employee's job or position, the employer should inform the employee of the change. These changes may affect an employee's duties, responsibilities, salary, work schedule, etc.

G. Work evaluation--An employer should evaluate an employee's job performance, whether it is good or bad.

H. Discipline--Most employers are fair in criticizing their employees. If employees do not fulfill the job agreed upon, they should not get angry about any disciplinary action.

I. Honest relationships--Most employers are fair with their employees, and employees are, in turn, fair with their employers.

J. Worker's Compensation--Most employers provide some form of insurance to employees for any injuries received while on the job.

IV. WHAT EMPLOYERS MAY EXPECT FROM EMPLOYEES

A. Cooperation--This involves sharing tasks when appropriate.

B. Honesty--Most employees are truthful with their employers.

C. Initiative--An employee should always show interest in developing new job skills.

D. Willingness to learn--It is to the employee's advantage to learn everything possible about his/her job.

E. Willingness to follow directions--An employee should try to follow directions exactly.

F. Dependability--A dependable employee is one whom an employer can expect to be on the job daily and on time.

G. Enthusiasm--The best employees like their jobs and show a sincere interest in job performance.

H. Acceptance of criticism--If deserved, an employee should accept criticism. This allows an employer to let workers know if they are not doing the job that is expected of them.

I. Loyalty--This is expressed by not complaining even though an employee may not agree with a company rule or policy. Keeping company business confidential shows loyalty.

J. Punctuality--This means being on time and taking only the time allowed for morning and afternoon breaks.

K. Regular attendance--An employee should be absent only when ill or in case of an emergency. In such cases, a call to the employer should be made so that a temporary replacement can be found.

L. Performance--Always doing the best job you can is a good goal for all employees.

M. Respect for rules--All employees must obey company rules and regulations.

N. Proper dress--This means wearing clothes suitable for the type of job you do.

V. ETHICAL CONDUCT ON THE JOB

A. Provide an accurate account of how time is spent on the job.

B. Show respect for morning and afternoon breaks.

C. Use company equipment properly.

D. Correctly report accidents that happen on the job.

E. Perform required duties even when the employer is not present.

F. Wear suitable clothes.

CHARACTERISTICS OF A GOOD CO-WORKER

VI. WAYS A STUDENT CAN GET ALONG WITH CO-WORKERS

(NOTE: A worker's responsibility involves more than just performing a job. Employers expect workers to work with a positive attitude toward the job and other employees.)

A. Know all co-workers by name.

B. Introduce yourself to employees you have not met.

C. Greet by name or at least smile at the other employees who try to be helpful.

D. Say good-bye, nod, or wave to co-workers when you leave for the day.

E. Listen, ask questions, and thank the employees who try to be helpful.

F. Realize that new, young employees may not be able to do some of the things that older, trusted employees do.

G. Develop the skill of really listening to the things you hear.

1. Be sure to get the message, not just hear the words.

2. Be aware that in most companies the ability to really hear a message is a matter of dollars and cents.

3. Look at the person who is talking to you to increase concentration.

4. Write down or repeat a message to make it easier to remember.

H. Work to keep communication lines open with all co-workers.

I. Do your share and always at least a little bit more.

J. Cooperate with others by being willing to pitch in and help them if they get behind.

K. Expect some teasing and take it in good humor.

L. Expect at the start to do more than your share of the dirty work.

VII. PURPOSES OF POLICIES

A. To provide the means for carrying out management processes

B. To aid in making decisions

C. To aid in solving problems

D. To provide consistency in the operation of a company

VIII. TYPES OF POLICIES

Policies vary widely from one company to another; however, most of them can be categorized under eight general headings.

A. Payroll practices

   1. Method of payment
   2. Pay periods
   3. Pay scale
   4. Payroll deductions

B. Work schedule

   1. Work hours and overtime
   2. Probationary employment period
   3. Time off
   4. Absences and tardiness
   5. Lunch break
   6. Coffee breaks
   7. Other

C. Benefits

   1. Vacations, holidays, and sick leave
   2. Paid health insurance
   3. Workers compensation
   4. Disability insurance
   5. Flexible hours
   6. Pensions
   7. Profit sharing

IX. PURPOSES OF PROCEDURES

A. To improve efficiency

B. To reduce costs

C. To standardize ways in which work is performed

D. To aid in creating a normal and smooth work climate

X. SOURCES OF INFORMATION

Information regarding policies and procedures may be found in several places.

A. Company manual

   1. Provides general information about the company
   2. May contain information, such as history and function of the company, organizational chart, chain of command, names of company executives, and departmental/division executives, etc.

B. Employee manual

   1. May be written as a section in the company manual or may be written as a separate publication
   2. Provides information that affects all employees, such as policies regarding work schedules, vacations, sick leave, holidays, company benefits, etc.

C. Office (job) manual

   1. Provides information on how to perform specific job duties
   2. May include information such as procedures for typing correspondence, ordering supplies, answering the telephone, etc.

XI. PUNCTUALITY

Most companies expect employees to be on time for work. This means not only being physically present, but also being ready to start work at the appointed hour. Frequent employee tardiness may result in:

A. Work being delayed because your work hasn't been done

B. Co-workers having to do your share of the work

C. Resentment and difficult working relationships

XII. ATTENDANCE

Absenteeism cannot be avoided. When it occurs, remember to:

A. Be courteous and notify your employer in advance, if possible

B. Stay at home if you are sick so you can get well. Exposing others will worsen the situation.

C. Not abuse sick days for leisure activities or personal business. Sick days are a privilege.

XIII. CHARACTERISTICS SHOWN IN ACCEPTING RESPONSIBILITY

A. Loyalty is shown by:

1. Standing up for friends and the employer

2. Working hard at your job to keep the standard high

3. Not talking unfavorably to others about the company or job

B. Dependability is achieved by:

1. Getting to work on time

2. Calling in when you will be missing work

3. Doing what you say you will

4. Finishing work on time

C. Honesty is displayed by:

1. Telling the truth

2. Expressing your feelings on a subject and standing by your convictions

3. Admitting your mistakes

4. Being trustworthy

5. Giving an honest day's work

XIV. ADVANTAGES OF HANDLING RESPONSIBILITY

A. Pay raises and promotions are more likely to happen when the individual shows an ability to handle responsibility.

B. Relationships with fellow workers are better.

C. Self-confidence is built.

D. A feeling of satisfaction with oneself occurs.

XV. WAYS AN INDIVIDUAL OFTEN AVOIDS RESPONSIBILITY

A. Making excuses

1. Bosses do not want an excuse; they just want the work finished.

2. Continuously making excuses can cause the employer to pass a person by when a better job opens.

3. Co-workers quickly point out individuals who make excuses rather than doing their part.

4. Making excuses can quickly become a habit.

5. Individuals who complete their work and do their part will never have to make an excuse for something not being finished.

B. Avoiding the boss

1. Employees often avoid the boss so they will not be asked to carry out a responsibility.

2. Meet new responsibilities head-on by asking questions and doing your best.

3. Look forward to the boss assigning new responsibilities because if they are done well, it may mean a raise or promotion.

C. Making little effort to do a good job

1. Some individuals will not make their best effort in carrying out a responsibility in hopes that the supervisor will not assign it again.

2. More often when a person quickly carries out a responsibility even though it may not be a pleasant one, the boss will assign the individual to more important and pleasant responsibilities.

XVI. UNDERSTANDING JOB RESPONSIBILITIES

A. Know the name and job description of your job

(NOTE: Many times workers are not sure what their particular job is called and what they are supposed to do. This can lead to confusion instead of a successful job.)

B. Ask questions if certain procedures are not clear.

C. Do not use a trial-and-error process to discover your job responsibilities.

BEST COPY AVAILABLE

D. Ask for a formal job description from the supervisor.

E. If there is no formal job description, it is good to write one for your own use.

XVII. ADJUSTMENT TO JOB RESPONSIBILITIES

A. Be flexible.

(NOTE: Many times job responsibilities will change from day to day. Be able to change with the demand.)

B. Be sure you understand new job responsibilities.

(NOTE: Instructions are not always clear and must be repeated.)

C. Ask co-workers about new responsibilities.

D. Be sure responsibilities can be carried out.

1. Workers may receive conflicting instructions.

2. Workers may receive instructions they are unable to carry out.

3. Workers may receive incorrect instructions.

EXAMPLE: The supervisor tells you to omit a step that might cause a product or operation to be unsafe.

ACTIVITY SHEET 1--THE IMPORTANCE OF A PROPER JOB ATTITUDE

Directions: Study the situation below concerning attitudes by reading the information and discussing the questions within your group.

Jan, 17, is a nurse's aide working in a nursing home known for its excellent patient care. Jan has the following assets: she dresses neatly, she is well-groomed, she has a good memory, and she is excellent at charting patients' records. Even though Jan is a good worker, smiling is not one of her characteristics, and it affects how patients feel toward her.

Open house is the busiest day of the year for the nursing home, and all personnel are expected to be on call that day. Jan wants to be off that day to visit a relative in another town. The nursing home supervisor gave Jan the day off without pay but feels Jan let the staff down (the staff feels the same way toward Jan).

Because open house is a busy day, all the staff have to work much harder to fill in for Jan. Jan returns to find it even more difficult to get along with the other employees and becomes cranky with the patients. The supervisor decides to fire Jan.

1. What kind of attitude does Jan show?

2. Could Jan have done something to save her job? If so, what?

3. What would you have done to deal with this situation?

4. Do you feel Jan was dealt with fairly?

ACTIVITY SHEET 2--SHOWING A POSITIVE ATTITUDE

Directions: After reading the situation below, answer and discuss the questions that follow.

Pat is a clerk in a local pharmacy and enjoys the opportunity to meet and talk to customers daily. Pat displays a friendly smile on the job and performs all aspects of the position quite well.

As time passes, the pharmacy owner notices that Pat is spending an unusual amount of time talking to customers, which results in other customers waiting in line 10 to 15 minutes. The owner is uncertain about confronting Pat about the problem because of her friendliness and good work.

Finally, the owner discusses the problem with Pat who understands the situation. Later, the owner notices Pat really trying to be successful and stay on the job.

1. What kind of attitude do you think Pat had?

2. How would you have helped Pat?

3. If the customer starts and continues the conversation, would you agree with the saying, "the customer is always right?" Why or why not?

4. Is it possible to be overly friendly in this type of job? Discuss.

ACTIVITY SHEET 3--SELECTING WORK CHARACTERISTICS

Directions: Study the factors listed below, all of which are thought to be important to job success. Place each factor in the pyramid in the order of importance to you. The factor you feel is least important should be placed at the bottom of the pyramid. Be sure to list all ten factors.

A. Work characteristics your employer seeks:

Willingness to assume responsibility

Loyalty

Reliability

Good human relations skills

Personal productivity

Attitude

Ambition

Initiative

Punctuality

Honesty

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Directions: This second list contains factors which you as an employee may look for when you go to work for a company. Follow the same procedure as before, and decide which of the characteristics can make your career more enjoyable and profitable.

B. Company characteristics an employee seeks.

A COMPANY:

that is reliable and honest

that recognizes and appreciates a good worker

that pays good, standard, or better wages

whose supervisors are leaders, not drivers

that encourages and helps its employees to learn

that protects each acceptable worker as if a "member of the family"

that provides retirement plan and for illness

that provides for annual vacation and rest periods

that makes every effort to safeguard workers against injury

where advancement is earned for ability--not through favoritism or relationship

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

ACTIVITY SHEET 4--EXPECTATIONS OF EMPLOYERS

Directions: Assume you are an employer. List some of the tasks you feel should be expected of your employees. Divide into groups and discuss the lists.

ACTIVITY SHEET 5--EXPECTATIONS OF EMPLOYEES

Directions: List several things that an employee expects from an exployer. Divide into groups and discuss the differences in the list together.

ACTIVITY SHEET 6--ROLE PLAYING EMPLOYER/EMPLOYEE RELATIONS

Directions: Two students are needed for this activity. One will role-play the company supervisor; the other will role-play the employee. Each "actor/actress" is to be very expressive. The time allowed for role-playing should be limited to five minutes.

Role of Supervisor

You are the supervisor of the production department. You must discipline an employee who has been absent five times in the last two weeks. The employee didn't call in on any of the occasions. The employee has been known to leave early without permission. Of course, this behavior is unacceptable. How will you deal with this employee? What will you say?

Role of Employee

You have three small children to support, and you are doing it alone. Your children have been sick for several days in the last two weeks. On several occasions, you have received a call from the day care center to pick up your children as soon as possible. You, of course, are very nervous when talking to the supervisor.

After each actor/actress has role-played a part, have them switch roles.

Ask the two students how they felt when they were the employee? The supervisor?

Divide the class into groups. Each group is to write a script in which the supervisor and employee discuss the problem and come to a solution. Choose two people from each group to role-play the new script for the class.

Discuss how important it is to look at both sides of the problem, rather than just looking at how the problem affects one side. The idea of seeing another person's point of view is called empathy.

ACTIVITY SHEET 7--MAKING FRIENDS AT WORK

A. What qualities do you look for in other people when you want to make friends? Rate the following qualities according to whether you feel they are important, very important, or not important.

	VERY IMPORTANT	IMPORTANT	NOT IMPORTANT
1. good-looking	______	______	______
2. helpful	______	______	______
3. popular with others	______	______	______
4. smart	______	______	______
5. kind	______	______	______
6. interesting	______	______	______
7. good at listening	______	______	______
8. funny	______	______	______
9. polite	______	______	______
10. respectful	______	______	______
11. independent	______	______	______
12. unusual	______	______	______
13. clever	______	______	______

B. Which of the following qualities do you think you have that would make people want to be friends with you?

_____ I am basically a warm person.

_____ I am a good listener.

_____ I am willing to be friends.

_____ I am usually polite.

_____ I try to understand people.

_____ I like many kinds of people.

_____ I have a sense of humor.

_____ I want to be liked.

_____ I want to be kind to others.

_____ I would help another person if I had the chance.

_____ I have some special skills I want to share.

_____ I have some hobbies and outside interests that I would like to share.

_____ I have an open mind.

C. Which other qualities do you have that have not been included in B.

D. You are attracted to certain people and want to make friends with them. How do you begin? Should you make a move toward them, or should you wait until they make a move toward you?

ACTIVITY SHEET 8--ATTITUDES THAT AFFECT CO-WORKERS

Directions: Discuss each of the attitudes listed below that affect your relationships with co-workers. Give examples of both positive and negative behaviors that are characteristics of each attitude.

EXAMPLE: Students who are enthusiastic--smile, are interested in others, are easily excited about new things.

A. Loyalty

1. Students who are loyal
2. Students who are disloyal

B. Enthusiasm

1. Students who are enthusiastic
2. Students who are unenthusiastic

C. Dependability

1. Students who are dependable
2. Students who are undependable

D. Honesty

1. Students who are honest
2. Students who are dishonest

E. Patience

1. Students who are patient
2. Students who are impatient

F. Helpfulness

1. Students who are helpful
2. Students who are not helpful

G. Willingness to accept criticism

1. Students who are willing to accept criticism
2. Students who are unwilling to accept criticism

ACTIVITY SHEET 9--ETHICAL CONDUCT

Directions: Read the paragraph below and answer the questions that follow.

Liza works at a doctor's office which is next door to a small trucking firm. In order to get to the office, Liza has to walk close to an area where the truck drivers gather. During the first work week, Liza wears a short skirt and a tube top. As she passes the trucker's area, she receives several whistles, shouts, and hand gestures. Not knowing what to do, she just smiles.

For several days each time Liza passes the driver's area, she receives whistles and shouts. The following day Liza quits, explaining to her boss that she was "fed up" with the loud whistles and jokes.

1. Do you think Liza made any mistakes?

2. What would you do if someone whistled at you for a week?

3. Do you think Liza should have gone to her boss with her problem? Why or why not?

ACTIVITY SHEET 10--DETERMINING COMPANY POLICIES AND PROCEDURES

Directions: Interview an employer in your community regarding company policies and procedures. Ask some of the following questions and record the responses in the spaces provided or on a separate sheet of paper.

1. Does your company provide policy and procedures manuals for your employees? If so, what types of manuals?

2. What are your policies for vacation and sick leave? When may a new employee take them?

3. What types of benefits do you provide for your employees?

4. What policies do you have regarding promotions and transfers?

5. What procedures do you use for handling disciplinary problems?

6. What procedures do you use for interviewing and hiring employees?

ACTIVITY SHEET 11--RESPONSIBLE, OR NOT?

Directions: Decide whether the individual described is showing responsibility or is avoiding responsibility. Show your answer by placing a check mark in the correct column.

Situation	Showing Responsibility	Avoiding Responsibility
A. I'm not going to pick our seats. You decide.		
B. I'm taking a waiter's job. That's what I want.		
C. I'll take any job you have. I don't care.		
D. The movie was terrible! Why did you tell me to go?		
E. The job is just what I'm looking for. I'll take it.		
F. Get the silver one. I know she will like it.		
G. I'll do what you suggest. If it doesn't work out, it's your fault.		
H. I did the best I could. It didn't work out because the instructions were wrong.		

ACTIVITY SHEET 12--EXCUSES

A. List five tasks you avoid doing by making excuses.

B. List your five "favorite" excuses.

C. List the ways you could avoid having to make excuses in the situations you listed in A.

UNIT TEST

A. Match the terms to their definitions by placing the correct letter in the space at the left.

___ 1. Obligation
___ 2. Positive
___ 3. Considerate
___ 4. Enthusiasm
___ 5. Offensive
___ 6. Criticism
___ 7. Initiative
___ 8. Success
___ 9. Reflect
___10. Evaluation
___11. Attitude
___12. Confidential
___13. Impression
___14. Unique
___15. Appropriate
___16. Disciplinary
___17. Tactful

a. achieving something you set out to do
b. aware of and respecting ideas and feelings of others
c. how one sees something or someone
d. having a duty to perform; keeping a promise or contract
e. suitable or proper
f. to cause as a result of one's actions
g. a way of acting or feeling about something or someone
h. not talking about company business with anyone it does not concern
i. strong feeling or excitement; a strong desire
j. being the only one of a kind; different
k. enforcement of rules; giving punishment or making corrections
l. being sure of something; having no doubt
m. one's own actions; the ability to get things started
n. showing a sense of what is the right thing to do without causing hurt feelings
o. being unpleasant, rude, distasteful, or embarrassing
p. determining worth by careful study
q. judging if good or bad, pointing out faults

B. In two or three sentences, explain the importance of a proper job attitude.

C. Indicate if the employer or employee expects the following from the other party by writing employer or employee in the space at the left.

_______________ 1. Salary

_______________ 2. Honesty

_______________ 3. Training

_______________ 4. Initiative

_______________ 5. Employee Compensation

_______________ 6. Explanation of rules

_______________ 7. Willingness to learn

_______________ 8. Enthusiasm

_______________ 9. Acceptance of criticism

_______________ 10. Performance

_______________ 11. Proper dress

_______________ 12. Safe working conditions

_______________ 13. Loyalty

_______________ 14. Punctuality

_______________ 15. Regular attendance

D. Answer the following statements true or false by placing a T for true or an F for false in the space at the left.

_______ 1. Sharing activities with co-workers will keep communication closed.

_______ 2. Use company equipment properly.

_______ 3. People have different life styles.

_______ 4. When things don't go the way you want, throw a fit.

_______ 5. Show respect for morning and afternoon breaks.

_______ 6. Wear suitable clothes for your job.

_______ 7. Your first impression of somebody is always correct.

_______ 8. Develop a good sense of humor.

_______ 9. Perform required duties even when the employer is not present.

_______ 10. Impressions are not formed on how you look.

E. Match the correct term to its definition by placing the letter in the appropriate space.

___ 1. An evaluation of a person's job performance

___ 2. Specific regulations which must be followed

___ 3. Money paid by an employer to employees based upon the profits of the business

___ 4. Additional monetary and/or non-monetary advantages provided to employees

___ 5. Stated guidelines of the company which explain how something is to be done

___ 6. A plan under which employees individually set their own arrival and departure times for working

___ 7. Guidelines for carrying out company policies or plans

a. benefits

b. flex-time

c. performance appraisal

d. policies

e. procedures

f. profit sharing

g. rules

F. Using the list provided at the right, identify the purposes of policies and procedures by listing the appropriate identifying letters in the spaces provided.

1. Purposes of policies

2. Purposes of procedures

a. to improve efficieny

b. to aid in making decisions

c. to provide consistency in the operation of the company

d. to standardize ways in which work is performed

e. to reduce costs

f. to provide the means for carrying out management processes

g. to aid in solving problems

h. to aid in creating a normal and smooth work climate

G. List the eight general headings for company policies.

H. List the three general headings for company policies.

I. List four sources of information regarding policies and procedures.

J. Place an X by the statements that describe a characteristic of a good co-worker.

___ a. Only talks to one or two close friends

___ b. Introduces self to other co-workers he/she has not met

___ c. Learns the names of other employees

___ d. Does not try to do things on the job that have not been explained

___ e. Is absent when there is a big work load

___ f. Offers to help an employee who is behind with work

___ g. Understands that the newest employee does more of the dirty work

___ h. Listens very carefully to instructions

___ i. Gets mad if co-workers tease a little

___ j. Always does his/her share and a little more

K. Read the following characteristics of a good co-worker and place a "P" for positive ones a student should try to develop.

___ a. Sense of humor

___ b. Knowledge of all the good gossip

___ c. Impatience

___ d. Clean, neat appearance

___ e. Shows enthusiasm for the job

___ f. Goes along with the crowd, good or bad

___ g. Politeness

___ h. Respects the beliefs of others

___ i. Dependability

___ j. Frowns a lot

___ k. Helpfulness

___ l. Tries to smile at all co-workers

___ m. Honesty

L. List the four advantages of handling responsibility.

a.

b.

c.

d.

M. The sentences below deal with handling responsibility and making excuses. Choose the correct word or words to complete the sentences.

a. Making excuses can become ______________.

(1) good (2) fun (3) a habit

b. Many times people begin to ______________ their own excuses.

(1) like (2) believe (3) make up

c. People who always make excuses are usually ______________ with themselves.

(1) in love (2) unhappy (3) in trouble

d. Making excuses may be your way of avoiding ______________.

(1) failure (2) hard work (3) playtime

e. Constantly making excuses can cause an employer to avoid giving you ______________.

(1) a lot of trouble (2) an extra bonus (3) a better job

f. Bosses get fed up with excuses when they expect to see work __________.

(1) ruined (2) finished (3) burned up

g. Not making excuses can lead to ______________.

(1) firing (2) bad trouble (3) pay raises

TEST

N. Below are eight statements dealing with the things that make up responsibility. The statements express characteristics of loyalty, dependability, and honesty. Put an "L" in the blank if the statement refers to dependability, and an "H" if it refers to honesty.

1. _______ Getting to work on time
2. _______ Being fully trustworthy
3. _______ Standing up for friends and employer
4. _______ Admitting mistakes
5. _______ Calling in when work must be missed
6. _______ Giving an honest day's work
7. _______ Working hard and not talking to others about the company for which one works
8. _______ Doing what one promises to do

ANSWERS TO ACTIVITY SHEETS

Answers to activities should be evaluated to the satisfaction of the instructor.

ANSWERS TO UNIT TESTS

A. 1. d
2. l
3. b
4. i
5. o
6. q
7. m
8. a
9. f
10. p
11. g
12. h
13. c
14. j
15. e
16. k
17. n

B. Students' answers should include one or two of the following:

1. A proper job attitude is the most important part in job success.
2. Many new workers lose their jobs because of a poor attitude.
3. Your attitude shows your outlook on life.
4. Set goals and work toward them.
5. Attitude is shown by the way you act in the presence of others.

C. 1. employee
2. employer or employee
3. employee
4. employer
5. employee
6. employee
7. employer
8. employer
9. employer
10. employer
11. employer
12. employee
13. employer
14. employer
15. employer

D. 1. F
2. T
3. T
4. F
5. T
6. T
7. F
8. T
9. T
10. F

E. 1. c
2. g
3. f
4. a
5. d
6. b
7. e

F. 1. b, c, f, and g
2. a, d, e, and h

G. 1. Payroll practices
2. Work schedule
3. Benefits
4. Employee facilities
5. Career factors
6. Employee/employer rights and responsibilities
7. Safety
8. Miscellaneous

H. 1. Operating procedures
2. Departmental procedures
3. Company procedures

I. 1. Company manual
2. Employee manual
3. Office manual
4. Bulletin boards
5. Information sheet or memorandum
6. Orientation programs
7. Correspondence files
8. Other employees/your employer
9. Company magazine or newsletter

J. a.
b. X
c. X
d.
e.
f. X
g. X
h. X
i.
j. X

K. a. P
b.
c.
d. P
e. P
f.
g. P
h. P
i. P
j.
k. P
l. P
m. P

L. a. Pay raises and promotions are more likely to happen when the individual shows an ability to handle responsibility.
b. Relationships with fellow workers are better.
c. Self-confidence is built.
d. A feeling of satisfaction with oneself occurs.

M. a. (3)
b. (2)
c. (2)
d. (1)
e. (3)
f. (2)
g. (3)

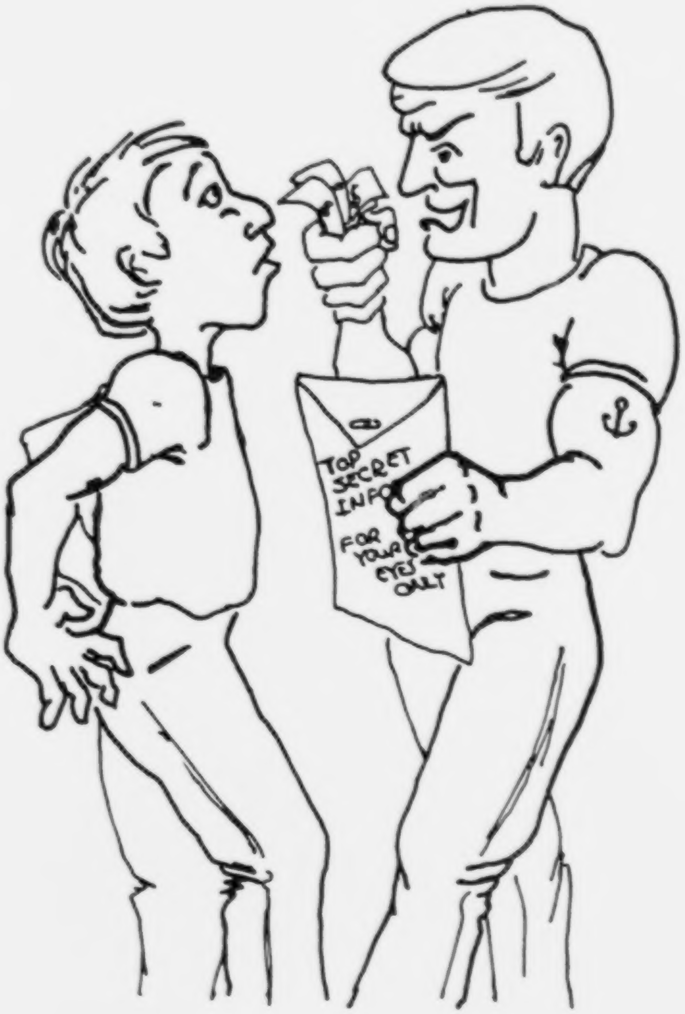
N. 1. D
2. H
3. L
4. H
5. D
6. H
7. L
8. D

STEPS IN STARTING A NEW JOB

1. Be on time.
2. Always look your best.
3. Don't be too familiar.
4. Be courteous.
5. Respect the know-how of others.
6. Do not gossip.
7. Avoid out-of-place humor.
8. Be friendly.
9. Learn the rules.
10. Be willing.

GETTING ALONG WITH OTHER EMPLOYEES

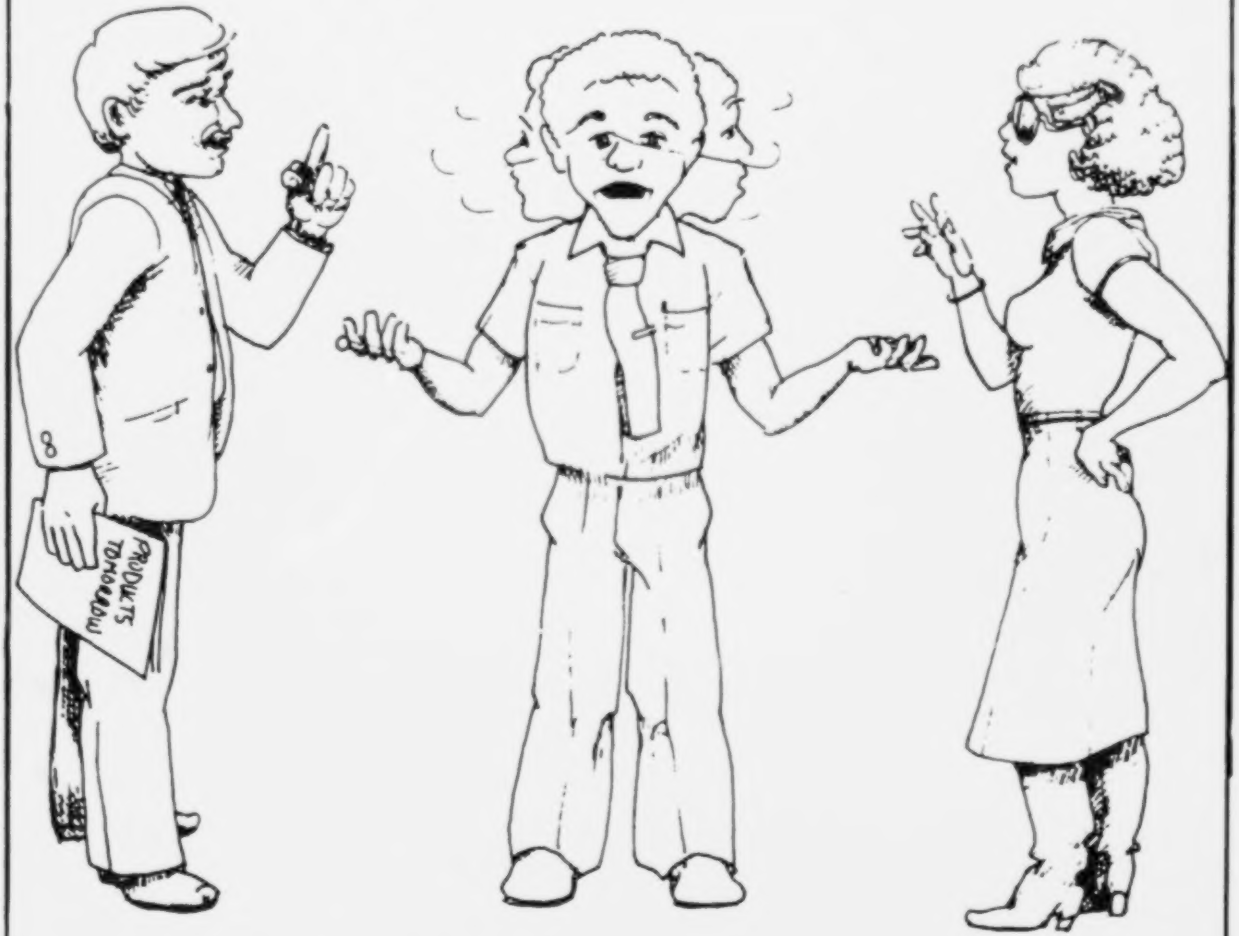
RECEIVING INSTRUCTIONS


TOP SECRET INFO
FOR YOUR EYES ONLY

- WORKERS MAY RECEIVE INSTRUCTIONS THEY BELIEVE ARE MORALLY WRONG.

- DON'T DO SOMETHING THAT COULD GET YOU OR YOUR BOSS IN TROUBLE!

WHEN YOU ARE GIVEN CONFLICTING INSTRUCTIONS


PRODUKTS
TOMORROW

WORKERS MAY BE GIVEN CONFLICTING INSTRUCTIONS.

ALWAYS GO TO YOUR IMMEDIATE BOSS FOR FINAL INSTRUCTIONS.

EMPLOYMENT OPPORTUNITIES

75.81(a)(2) Concepts and skills related to successful employment. The student shall be provided opportunities to:

(a) Develop an awareness of employment opportunities in chosen field

(b) Practice correct procedures for job application and interview

EMPLOYMENT OPPORTUNITIES

UNIT OBJECTIVE

The student will develop an awareness of employment opportunities in the office and identify and practice correct procedures used in the job application process.

SPECIFIC OBJECTIVES

1. Identify opportunities available as sources when seeking employment.
2. Identify skills necessary for employment in a business situation.
3. List sections included in a resume.
4. Demonstrate the ability to:
    - a. Locate and use a variety of sources for finding a job
    - b. Prepare a personal inventory form
    - c. Prepare a resume
    - d. Write a letter of application
    - e. Complete an application form
    - f. Interview for a job
    - g. Write a follow-up letter

TEACHER ACTIVITIES

1. Review and discuss objectives with students.
2. Show slide/tape presentation, Recognizing Skills Necessary for Employment in a Business Office.
3. Arrange for an employer to visit the class and discuss the qualifications employers are looking for in office employees.
4. Provide students with the classified sections of newspapers.
5. Show slide/tape presentation, Sources to Use When Seeking Employment.
6. Show slide/tape presentation, Preparing a Resume and Writing a Letter of Application.
7. Show slide/tape presentation, The Job Interview Process.
8. Arrange for a person to conduct mock interviews with the students.

STUDENT ACTIVITIES

1. Discuss objectives of the unit.
2. See slide/tape presentations on the Job Interview Process.
3. Complete Activity Sheets.
    - a. Activity Sheet 1--Self Inventory
    - b. Activity Sheet 2--Office Skills
    - c. Activity Sheet 3--Sources of Employment
    - d. Activity Sheet 4--Sources of Information
    - e. Activity Sheet 5--Personal Inventory
    - f. Activity Sheet 6--Preparing a Resume
4. Use TM's.
    - g. Activity Sheet 7--Writing a Letter of Application
    - h. Activity Sheet 8--Preparing An Application Form

EVALUATION-Unit Test

ESTIMATED COMPLETION TIME - 10-20 hours

UNIT OUTLINE

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

THE ADMINISTRATIVE SECRETARY
McGraw-Hill Book Company
Princeton Road
Highstown, NJ 08520

BUSINESS COMMUNICATION: A PROBLEM-SOLVING APPROACH
McGraw-Hill Book Co.

BUSINESS CORRESPONDENCE: A TEST-WORKBOOK FOR COLLEGES
McGraw-Hill Book Co.

CAREER EXPLORATION AND PLANNING
Houghton-Mifflin, TSC
Dept. 19
Box 683
Hanover, NH 03755

CLERICAL OFFICE PROCEDURES
South-Western Publishing Co.

COMMUNICATING IN BUSINESS
Science Research Associates
Chicago, IL 60611

EFFECTIVE ENGLISH FOR BUSINESS COMMUNICATION
South-Western Publishing Co.

THE EMPLOYMENT INTERVIEW
MPC Educational Publishers
3839 White Plains Rd.
Bronx, NY 10467
Audiovisual

FROM CAMPUS TO CAREER SUCCESS
Science Research Associates, Inc.
1540 Page Mill Road
Palo Alto, CA 94304

GENERAL OFFICE PROCEDURES
McGraw-Hill Book Co.

GENERAL OFFICE PROCEDURES FOR COLLEGES
South-Western Publishing Co.

GETTING A BETTER JOB
McGraw-Hill Book Co.

THE JOB APPLICATION PROCESS
(Four slide/tape presentations)
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

THE JOB YOU WANT--HOW TO GET IT
South-Western Publishing Co.
5101 Madison Rd.
Cincinnati, OH 45227

MAKING A LIFE...MAKING A LIVING: A MANUAL FOR GOING TO WORK
The Center for Career and Life Planning
Box 206
Biddeford Pool, ME

OPPORTUNITIES IN OFFICE OCCUPATIONS
National Textbooks
8259 Niles Center Rd.
Skokie, IL 60076

PERSONAL DEVELOPMENT
South-Western Publishing. Co.
Audiovisual

PSYCHOLOGY, HUMAN RELATIONS, AND MOTIVATION
McGraw-Hill Book Co.

RESUME WRITING: A COMPREHENSIVE HOW-TO-DO-IT GUIDE, 2nd edition
John Wiley and Sons
605 3rd Avenue
New York, NY 10016

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co.

SECRETARIAL OFFICE PROCEDURES FOR COLLEGES
South-Western Publishing Co.

SECRETARIAL PROCEDURES AND ADMINISTRATION
South-Western Publishing Co.

THE SECRETARY: AN INTEGRATED BLOCK PROGRAM
McGraw-Hill Book Co.

TODAY'S WOMAN
McGraw-Hill Book Co.

WRITING, LISTENING, AND SPEAKING FOR BUSINESS AND PROFESSIONAL STUDENTS
Wadsworth Publishing Co., Inc.
Belmont, CA 94002

WRITING PRACTICALLY
AMSCO School Publications, Inc.
315 Hudson St.
New York, NY 10013

PERFORMANCE CHART

75.81(a)(2)

OBJECTIVE: The student will develop an awareness of employment opportunities in the office and identify and practice correct procedures used in the job application process.

	MASTERY	NON MASTERY
1. ACTIVITY SHEET 1--SELF INVENTORY		
2. ACTIVITY SHEET 2--OFFICE SKILLS		
3. ACTIVITY SHEET 3--SOURCES OF EMPLOYMENT		
4. ACTIVITY SHEET 4--SOURCES OF INFORMATION		
5. ACTIVITY SHEET 5--PERSONAL INVENTORY		
6. ACTIVITY SHEET 6--PREPARING A RESUME		
7. ACTIVITY SHEET 7--WRITING A LETTER OF APPLICATION		
8. ACTIVITY SHEET 8--PREPARING AN APPLICATION FORM		
9. ACTIVITY SHEET 9--WRITING A FOLLOW-UP LETTER		
UNIT TEST		

BEST COPY AVAILABLE

I. PREPARATION FOR UNIT

A. Gather any resources and references necessary to provide additional information to supplement the unit.

B. Obtain application forms from various companies for use in this unit.

C. Gather classified ad sections of various newpapers for use in this unit.

D. Obtain the series of slide/tape presentations from the Occupational Curriculum Laboratory to reinforce the information presented in each of the information sheets.

E. Design a bulletin board to illustrate the information presented in this unit, such as advertisements, samples of letters of applications, resumes.

II. OBJECTIVE SHEET

A. Discuss the unit and specific objectives.

B. Add any additional objectives if information is added to this unit.

III. UNIT OVERVIEW AND ACTIVITIES

A. Qualifications for Office Employees

1. Discuss the information presented.
2. Show slide/tape presentation, *Recognizing Skills Necessary for Employment in a Business Office*. Emphasize the importance of developing these skills.
3. Arrange for a person from an employment agency or an employer to visit the class and discuss the qualifications employers are looking for in office employees.
4. Provide students with the classified sections of newspapers.
5. Have students complete ACTIVITY SHEETS 1 and 2. Have the students compare the skills they listed in ACTIVITY SHEET 1 with the skills required for each job they listed in ACTIVITY SHEET 2.

B. Sources to Use When Seeking Employment

1. Provide examples of each source listed in the information sheet.
2. Discuss the information using the examples to illustrate the discussion.
3. Show slide/tape presentation, *Sources to Use When Seeking Employment*.
4. Arrange for representatives from private and public employment agencies to speak to the class about services provided, fees charged, etc.
5. Have students complete ACTIVITY SHEETS 3 and 4. Provide them with the classified sections of various newspapers.

C. Preparing a Resume and Letter of Application

1. Discuss the information presented.
2. Use TM-6--RESUME to show organization and format for preparing a resume.
3. Use TM-7--LETTER OF APPLICATION to illustrate preparing a letter.
4. Show slide/tape presentation, *Preparing a Resume and Writing a Letter of Application*.
5. Have students complete ACTIVITY SHEETS 5, 6, and 7.

D. Job Interview Process

1. Discuss the steps in preparing for an interview and what to do during an interview.
2. Discuss the content and writing of a follow-up letter. Use TM-8 to illustrate the discussion.
3. Show slide/tape presentation, The Job Interview Process.
4. Arrange for a resource person to speak on the process of applying for a job, emphasizing the application form, employment tests, and the interview. (Use a business advisory member or a person from an employment agency.)
5. Have students complete ACTIVITY SHEETS 8 and 9. Provide them with other application forms for extra practice.
6. Arrange for a person to conduct mock interviews with the students. (Use employers from your business advisory committee or from businesses in your community.)

IV. ANSWERS TO ACTIVITY SHEETS

A. Answer keys are not provided for the activities.

B. Activity Sheets should be evaluated to the satisfaction of the instructor.

V. UNIT TEST

A. Various approaches may be used in testing.

1. Give each part as the information for one area as completed.
2. Give test upon completion of the unit and activities.
3. Use test as an additional activity.

B. Add test parts corresponding to any information added to the unit.

I. GENERAL OFFICE SKILLS

A. General office skills are those skills all persons who work in business offices need in order to perform tasks they are assigned.

B. Skills are not specific to any one task.

C. Basic skills include:

1. A good command of the English language
    a. In order to communicate with people with whom you come in contact
    b. To be able to use words that say exactly what you want to say so that you are not misunderstood
2. A knowledge of correct grammar and punctuation usage
    a. To be able to recognize grammar and punctuation errors
    b. To be able to correct grammar and punctuation
3. The ability to spell words correctly
4. The ability to do basic arithmetic
    a. To check figures for accuracy
    b. To be able to enter figures into a calculator correctly
5. The ability to produce work quickly and accurately
6. A knowledge of basic bookkeeping tasks, such as:
    a. Keeping payroll records
    b. Maintaining a petty cash fund and records
    c. Writing and balancing the checkbook
    d. Computing invoices and purchase orders
7. Legible handwriting
8. The ability to use reference books

II. SPECIFIC OFFICE SKILLS

A. Skills necessary to do the job for which you are hired

B. These skills may include:

1. Typewriting--required in most office positions
2. Taking dictation--a required skill for a high-level secretarial position
3. Transcribing--either from shorthand or from machine dictation
4. Sorting, filing, and retrieving information--one of the most common skills required
5. Using office machines
6. Using the telephone
7. Handling the mail

III. PERSONAL/PROFESSIONAL SKILLS

A. Skills that each employee uses to relate to other people

B. These skills include:

1. Enthusiasm--about life, your job, and your employer
2. Loyalty--a positive attitude towards and about the boss, the company, and fellow workers
3. Initiative--the quality which you show when you see things that need to be done, and do them--without being told
4. Reliability--being dependable, prompt, trustworthy
5. Organizational ability--being able to plan, set priorities, and to follow up on assigned tasks to be sure they are completed on time
6. Emotional stability--the ability to work under pressure and stress
7. Confidentiality--not discussing, repeating, or sharing company business with others
8. Ability to work with people

SOURCES TO USE WHEN SEEKING EMPLOYMENT

I. SELECTING PROSPECTIVE EMPLOYERS

A. Know the type of employment you desire.

B. Be aware of the kind and level of position for which you are qualified.

C. Prepare a list of prospective employers.

1. Include the following information:

   a. Names

   b. Addresses

   c. Telephone Numbers

2. Organize the list to identify preference for employment.

II. SOURCES OF EMPLOYMENT

A. Classified section of the newspaper

1. Used to

   a. Announce vacancies

   b. Search for qualified employees

2. Includes the following information:

   a. The position being advertised

   b. The qualifications required of the applicant

   c. The salary that will be paid

3. Types of employement advertisements

   EXAMPLE:

   BOOKKEEPER SECRETARY Wanted for CPA--Attorney Good typist, full-charge bookkeeping. Must be honest & dependable $600/per month to start. SWLR. Call 562-4252.

   a. Identified advertisement which identifies:

      (1) The company seeking the applicants

      (2) The location of the company

      (3) Pertienent information about the available position

   b. Blind advertisement

      (1) Does not identify the company

      (2) Provides an address or telephone number where resumes may be sent or inquiries may be made

      (3) Lists salary and qualifications for the position

      (4) Enables the employer to screen applicants on the basis of letters and resumes

      EXAMPLE:

      EXCELLENT JOB OPPORTUNITY
      Friendly & fast growing, employee benefits firm, needs someone to file, sort mail & answer phone. Some typing ability helpful. As we grow, so would opportuity to improve your position. Desire only serious hardworking applicants. Send resume & salary requirements to: P O Box C-79, Little Rock, AR 72203.

   c. Employment agency advertisement

      (1) Placed by an employment agency

      (2) Used to

         (a) Seek applicants for specific jobs

         (b) Find clients to fill positions that may become available in the near future

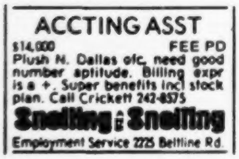
      (3) Requires that a fee be paid either

         (a) By the firm seeking the employee, or

         (b) By the person hired for the position advertised

- d. Temporary employment service advertisement
  - (1) Provide workers for companies that need people temporarily
  - (2) Would be employed by the agency

  EXAMPLE:



ACCTING ASST

$14,000 FEE PD

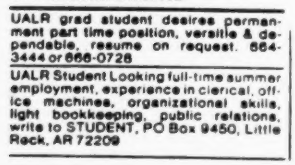
Plush N. Dallas ofc. need good number aptitude. Billing expr is a +. Super benefits incl stock plan. Call Crickett 242-8575

Snelling & Snelling

Employment Service 2225 Beltline Rd.

- e. Situation-wanted advertisement
  - (1) Placed by the person seeking employment
  - (2) Describes:
    - (a) The work sought by the applicant
    - (b) The qualifications of the applicant
    - (c) Phone number or address for contacting the applicant

    EXAMPLE:



377. Situations Wanted

UALR grad student desires permanent part time position, versitile & dependable, resume on request. 664-3444 or 666-0728

UALR Student Looking full-time summer employment, experience in clerical, office machines, organizational skills, light bookkeeping, public relations, write to STUDENT, PO Box 9450, Little Rock, AR 72209

B. School placement office

1. A service usually available free of charge
2. Requires applicant to register with the office
3. Maintains and makes available an up-to-date list of employers who are seeking applicants
4. Arranges for employers to visit and interview applicants
5. Arranges for students to interview with the visiting employer

C. Employment agencies

1. Temporary employment agencies
   - a. Find the jobs for you
   - b. Pay you to work for someone else
   - c. Provide temporary positions
   - d. Charge fees; collected from employing firm
2. Public employment agencies
   - a. Represent employers
   - b. Accept your resume and application
   - c. Refer you to an interested company for an interview
   - d. Charge no fee
3. Private employment agencies
   - a. Accept your resume and application
   - b. Refer you to an interested company for an interview
   - c. May require either employers who use the agency or applicants who obtain the jobs to pay the fee

D. Civil Service announcements

1. List positions available in government agencies
2. Offer separate announcements for state and federal positions
3. Usually require examinations for state and federal positions
4. May be obtained by contacting the nearest U.S. government office of personnel management for a list of openings and examinations to be taken
5. City and county announcements available at city hall or county courthouse

E. Miscellaneous sources

1. Chamber of Commerce
2. Yellow Pages directory
3. Personnel offices for companies
4. Union halls
5. Company directories and trade journals obtained from the library and/or placement office
6. Personal contact, such as friends, relatives, and work associates
    a. Often provide possible "leads" to check out
    b. May give your name to someone who can be of help to you

PREPARING A RESUME AND LETTER OF APPLICATION

I. DEFINITIONS

A. Personal inventory form--a form used to record all information to be included on a resume

B. Resume--a profile of background and qualifications of an applicant; also called a data sheet or vita

II. ORGANIZATION OF RESUME

A. Sections

1. Arrangement
    a. Include only one topic in each.
    b. Label according to the information contained.
    c. Provide an aid to the reader in locating information.
2. Section titles may include:
    a. Educational background
    b. Employment history
    c. References
    d. Personal data
    e. School and Community activities
    f. Special skills
    g. Honors and awards

B. Format

1. Required sections
    a. Arrangement may vary.
    b. Place identification section first.
    c. Arrange the remaining sections according to the job requirements.

    EXAMPLE: If the ad stresses the need for specific skills, you should place the special skills section at the beginning of the resume.
2. Optional sections
    a. Personal data
    b. Extracurricular activities
    c. Honors and awards

III. WRITING THE RESUME

A. Get to the point.

1. Prepare a separate resume if applying for several jobs which emphasize different qualifications.
2. Limit the resume to one or two pages, preferably one page.
3. Include those facts significant to the job for which you are applying.
4. Omit irrelevant information, such as:
    a. Your personal data
    b. Extracurricular activities unrelated to the job
    c. Explanations
    d. Self-evaluations
5. Prepare a personal inventory before writing the resume.

B. Give complete information.

1. Skills
    a. Include the office skills you have, such as:
        (1) Typing speed
        (2) Shorthand speed
        (3) Transcription speed
        (4) Various office machines you can operate
        (5) Other skills
    b. List them in such a way that they can be read quickly and easily.
2. Work experience
    a. Include the following information for each job.
        (1) Name, address, and telephone number of the company
        (2) The dates of employment
        (3) Your job title
        (4) The name and title of your supervisor
        (5) A brief description of the duties performed
    b. Include any relevant work experience, such as:
        (1) Military service
        (2) Volunteer work
    c. Begin with the job you have now and work backwards.
    d. Omit this section if you have no previous experience.
3. Educational background
    a. Begin with the highest level of education you have completed.
    b. Include the following information for each entry:
        (1) The name and address of school
        (2) The degrees earned and the years in which you earned them
        (3) The year you graduated
        (4) Major area of study
        (5) Courses completed that best prepared you to do the job for which you are applying
4. School and/or community activities
    a. Only those activities related to the job you want
    b. The following information for each entry:
        (1) Names of organizations
        (2) Offices held
        (3) Years served in office
5. Honors and awards
    a. Honors and awards relevant to the job you want
    b. May include:
        (1) Recognition in a skills contest
        (2) Recognition for outstanding leadership or job performance
        (3) Graduated with top honors
6. Personal data

    (NOTE: This section is often omitted.)

    a. Should be placed near the end of the resume

b. Could include the following information:
    (1) Height
    (2) Weight
    (3) Social security number
    (4) Health
    (5) Date of birth
    (6) Marital status

7. References

a. With each reference entry include:
    (1) Name and job title
    (2) Address
    (3) Telephone number

b. Should include three persons who can tell an employer what kind of worker you are

(NOTE: Obtain permission from these persons to use their names.)

c. These references may be omitted and the statement "References will be furnished upon request," may be included below the section title.

C. Typing the resume

1. Use quality bond paper.
2. Type your resume neatly or have it printed professionally.
3. Arrange the information on the resume so it will be easy for the employer to read.
4. Prepare several original copies.

IV. LETTER OF APPLICATION

After the resume is completed, a letter of application is prepared to accompany the resume.

A. Purpose

1. Provides an opportunity for you to sell yourself to an employer
2. Serves as the initital contact with a company
3. Gives the employer a first and lasting impression of you

B. Content of letter

1. Paragraph one
    a. Serves as introduction to the rest of the letter
    b. Tells the reader what job you are applying for and how you learned of the job opening
2. Paragraph two
    a. Tells the reader what skills you have that would enable you to do the job
    b. Gives achievements or qualifications you have that would make you especially valuable in this position
3. Paragraph three
    a. Provides the opportunity for you to be creative and to really sell yourself
    b. Tells the reader what makes you, above every other applicant, the right person for this job
4. Paragraph four
    a. Restates your interest in the job
    b. States that you want to arrange a personal interview at the employer's convenience
    c. Gives a specific date on which you will call to arrange for the interview. (Include your telephone number so the employer can reach you quickly and easily.)

C. Typing the letter

1. Produce a letter that is neat and free of errors.

2. Place your return address directly above the dateline, aligned with the closing line of the letters.

3. Keep the letter to one page in length.

JOB INTERVIEW PROCESS

I. PREPARATION FOR THE INTERVIEW

A. Schedule an appointment, remembering to:

1. Identify yourself to the person who answers the telephone

2. State the purpose of the call

3. Request an appointment time at the convenience of the employer

B. Prepare a list of:

1. Things to do before the interview, such as:

a. Your resume

b. Letters of recommendation

c. A pen

d. A steno pad

e. Typewriting correction utensils

f. A word division manual

C. Plan your wardrobe.

1. Dress conservatively.

2. Be neat and clean.

3. Avoid extremes in hair styles, clothing, jewelry, or makeup.

D. Gather information.

1. Find out about the company where you are interviewing.

a. Write to the company for literature on the history and organization of the company.

b. Talk to employees of the company.

2. Know yourself.

a. Know why you want the job.

b. Know important facts and data about yourself.

c. Prepare a list of questions you want to ask.

II. APPLICATION FORMS AND EMPLOYMENT TESTS

A. Application forms

Before the interview you may be required to fill out an application form: Remember these suggestions:

1. Read through the form before you begin to record any information.

2. Use a typewriter or pen to complete the form.

3. Fill in every blank on the form.

4. Place the letters NA (not applicable) in the space if a statement does not apply to you.

5. Use your resume to help you in filling out the form.

B. Employment tests

As a part of the application process, you may be asked to take an employment test.

1. Purpose of tests:

a. Enables you to demonstrate the skills you possess

b. Allows the employer to observe how you perform under pressure

2. Types of employment tests

a. A timed typing test of at least five minutes

b. Others that may be required
   (1) Take and transcribe shorthand
   (2) Operate transcription equipment
   (3) Use a calculator
   (4) Produce mailable letters
   (5) Prepare typewritten tables
   (6) Proofread
   (7) Take an English usage test

III. JOB INTERVIEW

A. General guidelines
   1. Go to the interview alone. (Leave friends or relatives at home.)
   2. Be on time.
   3. Pay special attention to your appearance.

B. Specific guidelines
   1. Introduce yourself and state the purpose of the appointment.
      a. If an offer to shake hands is made, firmly shake the interviewer's hand.
      b. Remain standing until you are offered a chair.
   2. Allow the interviewer to conduct the interview.
   3. Speak in a clear and pleasant voice.
   4. Look at the interviewer when talking or listening.
   5. Be confident and relaxed.
      a. Place your hands on your lap or on the arms of your chair.
      b. Avoid nervous habits, such as chewing gum, smoking, "playing" with objects, etc.
   6. Be truthful and to the point when answering questions.
   7. Know what questions you want to ask about the company or about the job, such as:
      a. Duties to be performed
      b. Company policies
      c. Other work-related subjects
   8. Let the interviewer close the interview

IV. FOLLOW-UP LETTER

A. Purpose
   1. To thank the employer for the opportunity to interview
   2. To reaffirm interest in the position, or
   3. To inform the employer of your decision

B. Content of letter
   1. Brief and to the point
   2. Paragraph one
      a. Express appreciation for being given the opportunity to interview.
      b. Include the position for which you applied and the date on which you interviewed.
   3. Paragraph two
      a. Restate your interest in the position.
      b. Mention something positive about your visit or some unique qualifications that would make you the best person for the job.
   4. Final paragraph
      a. Tell the interviewer that you are looking forward to a decision from the company.
      b. Restate the address and phone number at which you can be reached.

ACTIVITY SHEET 1--SELF INVENTORY

On a separate sheet of paper, prepare a list of skills you possess. Categorize the skills as general, specific, or personal/professional.

ACTIVITY SHEET 2--OFFICE SKILLS

Consult the classified section of a newspaper to find at least five advertisements for office personnel. Clip or copy the ads selected. Read through the ads. On the worksheet provided, categorize the skills listed in the ads.

ACTIVITY SHEET 3--SOURCES OF EMPLOYMENT

In the spaces below, prepare a list of sources available in your community.

	INFORMATION SOURCE	PHONE NUMBER
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

ACTIVITY SHEET 4--SOURCES OF INFORMATION

Using the classified section of a newspaper, select four advertisements in which you would be interested and for which you would be qualified. Record the appropriate information on the form below. Cut out the ads selected, and identify the type of employment advertisement by writing "identified," "blind," or "employment agency," at the top of each ad. Staple the ads to this page.

	TYPE OF JOB	SALARY	QUALIFICATIONS REQUIRED
1.	________________	______	________________ ________________ ________________ ________________
2.	________________	______	________________ ________________ ________________ ________________
3.	________________	______	________________ ________________ ________________ ________________
4.	________________	______	________________ ________________ ________________ ________________

ACTIVITY SHEET 5--PERSONAL INVENTORY

Complete the personal inventory form provided with this activity. As you fill in the form, keep your handwriting neat and make sure the information is complete and accurate. Keep this form so that you may use it in completing Activity Sheet 6.

ACTIVITY 5 WORKSHEET

PERSONAL INVENTORY FORM

PERSONAL INFORMATION

Name ______________________________

Current Address ______________________________

Permanent Address ______________________________

Height ______________ Health ______________

Weight ______________ Marital Status ______________

Social Security No. ______________ Birthdate ______________

* * * * *

MILITARY INFORMATION

Branch of Service ______________________________

Attained Rank ______________ Time in Service ______________

Training Received ______________________________

____

____

Special Accomplishments, Achievements, or Contributions ______________

____

____

Date of Discharge ______________

WORK EXPERIENCE (List all jobs held, beginning with the most recent one first. Include both paid and unpaid work experience.

Job Title ______________________________

Company Name ______________________________

Company Address ______________________________

Department in Which Employed ______________________________

Immediate Supervisor ______________________________
(Name and Title)

Number of People Supervised ______________________________

ACTIVITY

SPECIAL SKILLS (List any talents and skills which you have that will help you in an office job, e.g., report-writing ability, public-speaking ability, foreign languages spoken or written, typing skills, shorthand skills, transcription skills, office machines operated. Indicate the level of your ability where applicable.)

ORGANIZATION AFFILIATIONS (List all student, job-related, civic, and social groups, committees, associations, task forces, etc. with which you actively work(ed).)

Name of Organization or Group ____________________

Address of Organization or Group ____________________

Type of Organization or Group ____________________

Your Position or Membership Type ____________________

Special Responsibilities or Accomplishments ____________________

Years of Membership ____________ to ____________

* * * * *

SPECIAL PROJECTS (List community, employment, or course-related projects in which you are/were actively involved. Include years of involvement.)

* * * * *

REFERENCES (State that references will be furnished upon request, or list names, positions, addresses, and telephone numbers of references.)

Major Job Responsibilities ____________________

Special Accomplishments, Achievements, or Contributions ____________________

EDUCATION (List all degree and certificate programs, special courses, seminars, workshops, or in-service programs taken at education institutions or in company-sponsored training. List the most recent first.)

Type of Degree or Certificate ____________________

Major ____________________ Minor ____________________

Rank in Class ____________________ Grade Point Average ____________

School or Firm Name ____________________

Location of Program ____________________

Inclusive Dates Spent in Program ____________ to ____________

Relevant Subjects (Add grades if high or desirable)

Special Reports, Projects, or Presentations ____________________

List anything you learned from this educational experience that you will be able to use in the job you are seeking.

* * * * *

ACTIVITY SHEET 6--PREPARING A RESUME

Using the personal inventory form you completed in Activity 5, prepare your resume based on the advertisement below. Be sure to arrange the material in a logical, easy-to-read format and try to include everything you want to say on one page.

ACTIVITY SHEET 7--WRITING A LETTER OF APPLICATION

Following the steps listed in the Unit Overview, prepare a letter of application to accompany the resume prepared in Activity 6.

ACTIVITY SHEET 8--PREPARING AN APPLICATION FORM

Using the resume prepared in Activity Sheet 6, complete the application form provided.

ACTIVITY SHEET 9--WRITING A FOLLOW-UP LETTER

Assume you have interviewed for the position described in Activity 6. Prepare a follow-up letter, addressing it to the person listed in the advertisement. Assume that you have not been offered the job but indicate that you are interested in working for the company.

UNIT TEST

A. Identify the basic office skills listed below for each of the three skill categories by placing one of the following in the correct space.

G for general office skills
P for personal/professional skills
S for specific office skills

_____ 1. Emotional stability
_____ 2. Basic arithmetic skills
_____ 3. English language skills
_____ 4. Transcription skills
_____ 5. Grammar skills
_____ 6. Office machines skills
_____ 7. Enthusiasm
_____ 8. Basic bookkeeping skills
_____ 9. Loyalty
_____ 10. Filing skills
_____ 11. Telephone techniques
_____ 12. Ability to work quickly and accurately
_____ 13. Shorthand skills
_____ 14. Initiative
_____ 15. Typewriting skills
_____ 16. Handling the mail
_____ 17. Legible handwriting
_____ 18. Confidentiality
_____ 19. Ability to work with people
_____ 20. Ability to use reference books

B. Match the terms associated with sources to use when seeking employment to their definitions by placing the correct letter in the appropriate space.

_____ 1. Used to announce vacancies and search for qualified employees
_____ 2. Advertisement which lists the company seeking applicants, locatiog of the company, and information regarding available position
_____ 3. Provides only an address or telephone number where resumes may be sent or inquiries may be made
_____ 4. Advertisement placed by an agency seeking applicants
_____ 5. Advertisement placed by an agency which provides workers for companies
_____ 6. Advertisement placed by a person seeking employment
_____ 7. Maintains and makes available an up-to-date list of employers and arranges for employers to visit and interview applicants
_____ 8. Agency that finds jobs for you and pays you to work
_____ 9. An agency which charges no fee and refers you to an interested company for an interview
_____ 10. Requires employer or applicant to pay fee for services provided
_____ 11. Lists of positions available in government agencies
_____ 12. A source which might provide "leads" on a job opening

a. blind advertisement
b. temporary employment advertisement
c. school placement office
d. classified section
e. situation-wanted advertisement
f. identified advertisement
g. temporary employment agency
h. personal contacts
i. employment agency advertisement
j. private employment agency
k. civil service announcement
l. public employment agency

C. Define the following terms

1. Personal inventory form

2. Resume

3. Letter of application

D. List the sections which may be included on a resume.

E. Write the letter of the response that correctly completes the following statements.

___ 1. In preparing for an interview, the first thing you should do is:

a. arrange for a friend to go with you
b. write a "thank you" letter
c. schedule an appointment

___ 2. You should take the following items with you on an interview:

a. letter of application, personal inventory sheet, your resume, and your mother
b. resume, letters of recommendation, a pen and pad, correcting utensils and word division manual
c. none of the above

___ 3. You may be required to:

a. be confident and relaxed
b. conduct the interview yourself
c. be truthful
d. let the interviewer close the interview
e. a, c, and d

JOB APPLICATION PROCESS

ANSWERS UNIT TEST

A. 1. P
2. G
3. G
4. S
5. G
6. S
7. P
8. G
9. P
10. S
11. S
12. G
13. S
14. P
15. S
16. S
17. G
18. P
19. P
20. G

B. 1. d
2. f
3. a
4. g
5. b
6. e
7. c
8. g
9. l
10. j
11. k
12. h

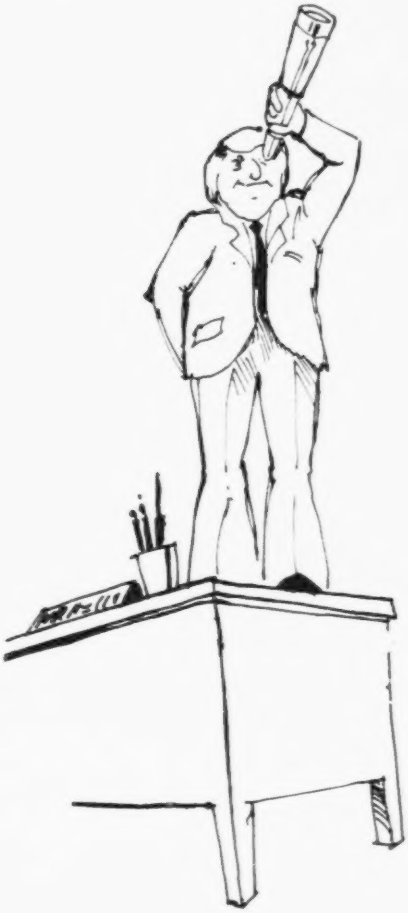
C. 1. Personal inventory form--a form used to record all information to be included on a resume

2. Resume--a profile of background and qualifications of an applicant

3. Letter of application--used to make initial contact with a company and provides an opportunity for you to sell yourself to an employer

D. Skills, work experience, educational background, school and/or community activities, honors and awards, personal data, references

E. 1. c
2. b
3. d
4. e
5. a



WHAT THE EMPLOYER LOOKS FOR IN AN EMPLOYEE

1. **BASIC SKILLS**

   Can they get the job done

2. **EXPERIENCE**

   Have they done this kind of work before

3. **EDUCATION**

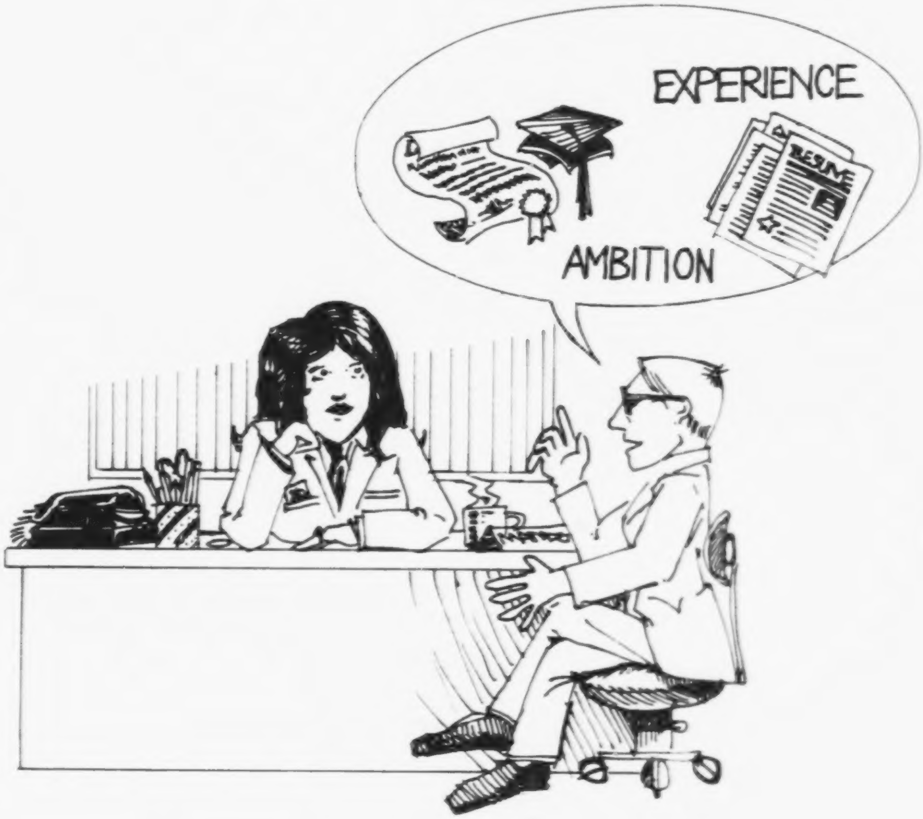
   Do they have the the knowledge to learn new technical skills

4. **PERSONALITY**

   Can they work with other people

HOW YOU TELL THE EMPLOYER YOU CAN DO THE JOB...

MAY DETERMINE IF YOU ARE HIRED


EXPERIENCE
RESUME
AMBITION

APPLICATION FOR EMPLOYMENT

PERSONAL INFORMATION

Date Social Security Number

Name Age Sex

Last First Middle

Present Address

Street City State

Permanent Address

Street City State

Phone No. Own Home Rent Board

Date of birth Height Weight Color of Hair Color of Eyes

Married Single Widowed Divorced Separated

Number of children Dependents other than wife or children Citizen of U.S.A. Yes ☐ No ☐

If related to anyone in our employ, state name and department Referred by

EMPLOYMENT DESIRED

Position Date you can start Salary desired

Are you employed now? If so may we inquire of your present employer

Ever applied to this company before? Where When

EDUCATION	Name and Location of School	Years Attended	Date Graduated	Subjects Studied
Grammar School				
High School				
College				
Trade, Business or Correspondence School				

Subjects of special study or research work

What foreign languages do you speak fluently? Read Write

U.S. Military or Naval service Rank Present membership in National Guard or Reserves

Activities other than religious (civic, athletic, fraternal, etc.)

Exclude organizations the name or character of which indicates the race, creed, color or national origin of its members

(CONTINUED ON OTHER SIDE)

Last

First

Middle

FORMER EMPLOYERS List below last four employers, starting with last one first

Date Month and Year	Name and Address of Employer	Salary	Position	Reason for Leaving
From				
To				
From				
To				
From				
To				
From				
To				

REFERENCES: Give below the names of three persons not related to you, whom you have known at least one year.

	Name	Address	Business	Years Acquainted
1				
2				
3				

PHYSICAL RECORD:
List any physical defects

Were you ever injured? Give details

Have you any defects in hearing? In vision? In speech?

In case of emergency notify

Name Address Phone No.

I authorize investigation of all statements contained in this application. I understand that misrepresentation or omission of facts called for is cause for dismissal. Further, I understand and agree that my employment is for no definite period and may, regardless of the date of payment of my wages and salary, be terminated at any time without any previous notice.

Date Signature

DO NOT WRITE BELOW THIS LINE

Interviewed By Date

REMARKS:

Neatness Character

Personality Ability

Hired For Dept. Position Will Report Salary Wages

Approved: 1 2. 3.

Employment Manager Dept. Head General Manager

RÉSUME

RÉSUMÉ OF

Jan Williams
815 N. Winnetka
Dallas, TX 75214
214/386-7214

SPECIAL SKILLS

Typewriting Speed: 70 wpm
Shorthand Speed: 100 wpm
Business Machines Operated:
- Electronic Calculator
- Stencil Duplicator
- Fluid Duplicator
- Transcription Equipment
- Copiers

EDUCATIONAL BACKGROUND

W. T. White High School; 4505, Ridgeside; Dallas, TX 75214; Diploma, May, 1980
Major Subject: Business courses; Grade Point Average: A
Business Subjects:
- Typewriting
- Shorthand
- Bookkeeping I & II
- General Recordkeeping
- Office Machines
- Office Education

EMPLOYMENT HISTORY

Bowden Insurance Agency
3635 Greenleaf
Dallas, TX 75215
214/371-1311

September, 1979-Present
Position: Secretary
Supervisor: Marion Bowden

Duties: Type routine correspondence and forms; take and transcribe letters from shorthand or machine dictation; answer the telephone and greet vistors; perform general filing duties; calculate insurance premiums and prepare invoices. (part-time employment)

SCHOOLS AND COMMUNITY ACTIVITIES

Office Education Association, 1978-80
Chapter President, 1979-80

HONORS AND AWARDS

First Place, General Office Skills Contest,
National Office Education Association
Leadership Conference, 1980

PERSONAL DATA

Height: 5 ft. 7 in.
Weight: 120 lbs.
Health: Excellent
Birthdate: November 24, 1962
Marital Status: Single
Social Security No.: 457-80-2457

REFERENCES

References will be furnished upon request.

LETTER OF APPLICATION

815 N. Winnetka
Dallas, TX 75214
June 27, 1980

Ms. Mary Anderson, Manager
Clive and Clive Lumber Co.
3605 Davis Road
Dallas, TX 75217

Dear Ms. Anderson:

The secretary/bookkeeper position you advertised in today's *TIMES HERALD* sounds exciting and interesting. Since I am confident I am qualified for this position, please consider me an applicant for the job.

You indicated in the advertisement that the person hired must be able to type and take shorthand. My typing speed of 70 words per minute and shorthand speed of 100 words per minute exceed minimum standards. In addition, I am skilled in the operation of various calculators, duplicators, and copiers. I am also familiar with a variety of filing systems.

As you will note on the enclosed résumé, I have had several bookkeeping courses. I feel this would shorten the time usually needed to train a new employee and would provide you with a productive employee from the start.

I am anxious to discuss this position with you. Therefore, I will telephone your office on July 1 to arrange for a personal interview. If you wish to contact me before that date, I can be reached at 214/386-7214.

Sincerely,

Jan Williams

Enc.

FOLLOW-UP LETTER

815 N. Winnetka
Dallas, TX 75214
July 2, 1980

Ms. Mary Anderson, Manager
Clive and Clive Lumber Co.
3605 Davis Road
Dallas, TX 75217

Dear Ms. Anderson:

Thank you for the opportunity to discuss with you on May 1 my qualifications for the secretary/bookkeeper position with your company. I was impressed with the benefits and opportunities offered by your company.

I am interested in the job and feel that my educational background and experience would help me in fulfilling the required duties.

If you need additional information, you may reach me at 214/386-7214.

Sincerely,

Jan Williams

OFFICE EDUCATION CORE

SAFETY

75.89(a)(4) OFFICE EDUCATION ESSENTIAL ELEMENT

Concepts and skills related to safety and safe working conditions. The student shall be provided opportunities to identify, understand, and apply safe working practices and procedures to all office training situations.

SAFETY

UNIT OBJECTIVE

After completing this unit, the student will be able to practice basic safety rules needed to maintain a healthy and safe environment and identify the correct first aid treatment for emergency situations. This knowledge will be evidenced through demonstration and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVE

1. Match terms associated with practicing safety to the correct definitions.
2. List the responsibilities and rights of employers and employees to maintain safety standards.
3. Discuss the Occupational Safety and Health Act of 1970 (OSHA) and the National Institute for Occupational Safety and Health (NIOSH).
4. Identify the necessary precautions to take for proper safety in the office.
5. Identify correct first aid treatment for emergency situations.
6. Discuss the general principles needed to maintain a safe environment at home and at work.
7. Select the correct safety rules associated with fire safety.

TEACHER ACTIVITIES

1. Preview the unit.
2. Prepare safety posters.
3. Prepare a bulletin board.
4. Arrange for guest speaker from NIOSH or fire department.
5. Discuss Unit Overview information with students.
6. Discuss and role-play safety in the office.
7. Explain and assign Activity Sheets.

STUDENT ACTIVITIES

1. Read and discuss Unit Overview information.
2. Role-play safety in the office safety procedures.
3. Complete the following Activity Sheets:
    a. ACTIVITY SHEET 1--EXPLAINING SAFETY RULES
    b. ACTIVITY SHEET 2--OSHA/NIOSH PROVISIONS
    c. ACTIVITY SHEET 3--RESPONSIBILITIES AND RIGHTS
    d. ACTIVITY SHEET 4--SAFETY ATTITUDES FOR THE OFFICE
    e. ACTIVITY SHEET 5--FIRE SAFETY

EVALUATION Unit Test

ESTIMATED COMPLETION TIME 3-6 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section

RESOURCES

ACCIDENT FACTS, 1979 EDITION
National Safety Council
Chicago

DEVELOPING SHOP SAFETY SKILLS
American Association for Vocational Instructional Materials
Athens, Georgia

FAMILY SAFETY
The National Safety Council
Chicago

GROUP INSTRUCTION FOR COOPERATIVE PROGRAMS
State Department of Vocational and Technical Education
Curriculum and Instructional Materials Center
Stillwater, Oklahoma

HELP! FIRST STEPS TO FIRST AID
Janus Publishing Company
Hayward, California

KANSAS VOCATIONAL CURRICULUM--OCCUPATIONAL SAFETY
Emporia State University/Kansas State Department of Education
Emporia, Kansas

SAFETY GUIDE
East Texas State University
Occupational Curriculum Laboratory
Commerce, Texas

SAFETY IN THE OFFICE

STUDENTS' PERSONAL ADJUSTMENT TO [illegible]
Instructional Materials Services
University of Texas
Austin, Texas

WORK: PATHWAY TO INDEPENDENCE
American Technical Society
Chicago

75.89(a)4

PERFORMANCE CHART

OBJECTIVE: After completing this unit, the student will be albe to practice basic safety rules needed to maintain a healthy and safe environment and identify the correct first aid treatment for emergency situations. This knowledge will be evidenced through demonstration and by satisfactorily completing a unit test.

	MASTERY	NON MASTERY
1. ACTIVITY SHEET 1--EXPLAINING SAFETY RULES		
2. ACTIVITY SHEET 2--OSHA/NIOSH PROVISIONS		
3. ACTIVITY SHEET 3--FIRE SAFETY		
4. ACTIVITY SHEET 4--SAFETY ATTITUDES FOR THE OFFICE		
UNIT TEST		

I. PREPARATION FOR THE UNIT

A. Preview the unit. To utilize this curriculum in the most effective way, you should review each unit of instruction and localize and individualize the material for your program.

B. Prepare safety posters.

C. Prepare a bulletin board.

II. OBJECTIVE SHEET

A. Review all objectives and then add or delete to meet local program needs.

B. Review and discuss with the students each specific objective as it relates to the program.

III. INFORMATION AND ACTIVITY SHEETS

A. General safety procedures

1. Explain the terms and definitions to the students.
2. Discuss with the students safety attitudes.
3. Discuss with the students safety rules.
4. Explain to the students the procedure for keeping an orderly work area.
5. Discuss the importance of proper care of the equipment.
6. Discuss the procedures to take in case of an emergency.
7. Complete ACTIVITY SHEET 1--EXPLAINING SAFETY RULES.

B. OSHA/NIOSH

1. Have a guest speaker from NIOSH speak to the class on the duties and standards of NIOSH.
2. Have an inspection officer speak to the class on the procedure used to evaluate and inspect places of work to see if safety standards are being met.
3. Use ACTIVITY SHEET 2--OSHA/NIOSH PROVISIONS to reinforce this area of information.

C. Responsibilities and rights

1. Have several employers from the nearby area speak to the class on the responsibilities and rights of the employer.
2. Have a class discussion on the similarities and differences between the rights and responsibilities of two groups.
3. Use ACTIVITY SHEET 3--RESPONSIBILITIES AND RIGHTS to reinforce this area of information.

D. Safety in the office

1. Discuss the information in the Unit Overview pertaining to safety in the office.
2. Role-play situations in the classroom concerning safety with office equipment.
3. Complete ACTIVITY SHEET 4--SAFETY ATTITUDE FOR THE OFFICE.

E. Fire safety

1. Arrange for a guest speaker from the fire department to make a presentation about:
    a. Types of fires
    b. Types of fire extinguishers
    c. Treatment of burns
2. Show the location of first aid materials for burns.
3. Show the location of the fire extinguisher.
4. Complete ACTIVITY SHEET 5--FIRE SAFETY

IV. TRANSPARENCY MASTERS

(NOTE: Transparency masters are included in the Student Manual and can be used as Information Sheet.)

A. TM-1--PROPER METHOD FOR MOVING MATERIAL

B. TM-2--TYPES OF FIRE EXTINGUISHERS

C. TM-3--KNOW YOUR FIRE EXTINGUISHERS

V. EVALUATION The Unit Test covers information on the Unit Overview

VI. ANSWERS TO UNIT TEST

A. Answers are based upon information covered in the unit.

B. For convenience in grading, include answer sheets to correspond to questions added to the test.

GENERAL SAFETY PROCEDURES

I. Terms and Definitions

- A. Accident--an unplanned event which could cause an injury
- B. Accident-prone--the feeling or belief that some people are more likely than others to have accidents
- C. Emergency--a condition that calls for immediate action
- D. Hazard--a source of danger
- E. Unsafe act--something that is not free from danger
- F. Unsafe condition--a situation that could lead to an accident
- G. Safety--freedom from danger, risks, or injury
- H. Shock--the feeling or effect caused by an electric current passing through the body

II. Safety Attitude

- A. A proper attitude is a must.
- B. Most accidents are caused by being careless.
- C. Everyone must be on guard against accidents at all times.
- D. Talking and clowning around should be avoided.
  - 1. This keeps you from being completely alert around office machines.
  - 2. It also makes you more accident-prone.

III. Safety Rules

- A. Use tools and equipment only for their purpose.
- B. Return all hand tools to their proper place after use.
- C. Keep areas clean and free of safety hazards.
- D. Clean up any spilled liquid immediately from floors, shelves, or tables.
- E. Do not sit or lean on tables.
- F. Keep all aisles, doorways, and areas around machines and equipment clean and clear of paper, boxes, and cords.
- G. Immediately report any unsafe condition.
- H. Do not get involved in any horseplay.
- I. Remove dangling jewelry when operating equipment.
- J. Avoid touching and looking directly at light sources.
- K. Keep all filing drawers and desk drawers closed when not in use.
- L. Ask the supervisor when you are not sure how to do something.

IV. Keeping a Safe and Orderly Working Place

- A. Arrange all equipment to permit safe and efficient operation.
- B. Keep materials and supplies safely stacked or stored.
- C. Keep all hand tools in proper storage area.
- D. Dispose of or store all chemicals in safe containers.
- E. Keep all floors clean and free from paper and spills at all times.
- F. Clean up daily.

V. Care of Equipment

- A. Care of equipment starts by caring for the area around it.
  - 1. The work area must be kept clean and neat.
  - 2. There should be enough space in the work area for correct machine operation.
  - 3. No articles, furniture, or supplies should block the operation of machine parts.
- B. Do not try to repair office equipment. When a piece of equipment is not operating properly:
  - 1. Pull plug; turn the machine off.
  - 2. Call the service repairperson.

C. Plugging and unplugging electrical equipment

1. Hold the electrical plug rather than the cord to plug or unplug machines.

2. Electrical cords should be checked to see if they are frayed, tangled, or damaged.

3. Electrical outlets must not be overloaded.

D. Turn off equipment when finished.

E. Clean up any equipment used.

VI. Steps to be Taken in Case of an Accident

A. Turn off power.

B. Administer first aid.

C. Report all accidents and injuries.

D. Take injured person to hospital emergency room.

FIRE SAFETY

I. General Rules

A. Practice fire prevention.

B. Find out what material is burning when a fire starts.

C. Quickly report a fire.

D. Know how to use a fire extinguisher.

(WARNING: DO NOT play with firefighting equipment because it may not work when you need it.)

E. Know the types of extinguishers.

(WARNING: Using the wrong type of extinguisher on a fire is dangerous.)

F. Know the location of the fire alarm or notify the office.

G. Know how to treat burns.

H. Keep a clean work area with flammables stored properly.

I. Know the correct way to leave a building in case of fire.

(NOTE: If there is not a plan on how to leave the building in case of fire posted by the door, ask your supervisor for instructions.)

II. Types of Fires

A. Class A--ordinary combustibles such as wood, paper, or cloth

B. Class B--flammable liquids or grease, such as gasoline, paints, or oils

C. Class C--electrical equipment, such as motors and switches

III. Types of Fire Extinguishers and Their Characteristics

A. Multi-purpose dry chemical

1. Selected dry chemicals under pressure

2. Can be used safely on all classes of fires

B. Ordinary dry chemical

1. Selected dry chemicals under pressure

2. Used only for class B and class C fires

C. Foam

1. A solution of aluminum sulfate

2. Used for class A and class B fires

D. Carbon dioxide

1. Carbon dioxide gas under pressure

2. Used for class B and class C fires

E. Soda acid

1. Bicarbonate of soda and sulphuric acid

2. Can be safely used only on class A fires

IV. Types of Burns....Appearance of Skin....Treatment

A. First degree...reddened skin...apply cold water

B. Second degree...blistered skin...apply cold water and sterile gauze

C. Third degree...charred or seared skin...get immediate medical help

OSHA/NIOSH

I. Provisions of the Occupational Safety and Health Act of 1970 (OSHA.)

(NOTE: OSHA became effective in 1970 under the Department of Labor, with 12 regional offices).

- A. Guarantee of safe working conditions for every person
- B. Reduction of hazards by providing new or improved safety and health standards and programs
- C. Development and enforcement of mandatory job safety and health standards
- D. Recording job-related injuries and illnesses for evaluation
- E. Establishment of employer and employee responsibilities

II. OSHA Inspection and Citations

- A. Inspections
    - 1. Places of work must meet certain standards
    - 2. Inspection of records for:
        - a. Deaths
        - b. Injuries
        - c. Illnesses
    - 3. Inspection of equipment and the working area

      (EXAMPLE: Broken guards on tools, blocked aisles, unsafe floor surfaces, and unsanitary conditions).
- B. Citations are given for:
    - 1. Failing to report an accident or death
    - 2. Not maintaining records
    - 3. Not fixing or maintaining tools and equipment in a safe manner
    - 4. Failing to post OSHA standards
    - 5. Giving false information
    - 6. Failure to post a notice in an unsafe or dangerous area

      (NOTE: Penalties are in the form of fines. Citations and fines that the employer feels are not justified can be appealed).

II. National Institute for Occupational Safety and Health (NIOSH)

- A. Established by the OSHA Safety Act of 1970
- B. An agency of the Department of Human Services
- C. Duties of NIOSH
    - 1. Conduct research on safety problems
    - 2. Provide technical assistance to OSHA
    - 3. Recommend standards for adoption by OSHA
    - 4. Publish safety material
    - 5. Inspect work places and request medical examinations in order to gain information on working conditions

      (NOTE: NIOSH works hand in hand with OSHA to try to assure a safe working place for all workers. If you have an idea pertaining to a safety standard, you may send it to the closest regional office.)

RESPONSIBILITIES AND RIGHTS

I. Employer's Responsibilities

- A. Inform employees of their rights under the OSHA Act
- B. Remove or guard hazards
- C. Use color codes, posters, or signs to warn
- D. Comply with OSHA standards
- E. Require employees to use personal protective equipment (shoes, hats, clothing)

F. Provide safe tools and equipment

G. Refrain from discrimination against employees who use their rights

H. Post OSHA citations at the work place

I. Keep records and reports

II. Employer's Rights

A. To be shown identification from OSHA inspectors

B. To be told the reason for a inspection

C. To be present during inspections and discussions

D. To help set safety and health standards

E. To require employees to follow safety rules

III. Employee's Responsibilities

A. Read OSHA posters at the job site

B. Follow safety instructions

C. Question things that are not understood

D. Use employee rights properly

E. Recognize hazards and remove or avoid them

F. Take safety seriously and don't "horse around"

G. Report all accidents promptly

IV. Employee's Rights

A. To request a safety inspection

B. To see that the employer corrects the unsafe condition

C. To expect the employer to be concerned about the safety of employees

SAFETY IN THE OFFICE

In today's modern, fast-paced business world, companies give much thought and planning to developing a safe, secure environment for its employees. Many elements are taken into consideration to provide facilities and programs that will contribute to the well-being of the people who work in those offices.

One of the areas of concentration is office design.

1. Planning of attractive and efficient surroundings
2. Good lighting for sufficient illumination for desks
3. Noise level caused by office equipment counteracted by special materials on the walls and floors to absorb the sound

The federal government has developed specific guidelines to provide safe and healthy work environments. In a recent study, it was determined that one of every 27 office workers is injured on the job every year. Ninety percent of office accidents result from unsafe actions such as:

1. Slipping
2. Tripping
3. Falling
4. Improper use of equipment
5. Collisions and obstructions
6. Fire and electricity

It is the company's responsibility to proivde a safe environment, but all employees must do their part. Some things workers can do to contribute to office safety include:

1. Be careful if you are sitting in a rolling chair or one that leans back.
2. Never run in hallways or on stairs.
3. If you have a pencil holder on your desk, be sure the pencils are put into it point first so that no one will get hurt on the sharp points.
4. Do not overload electrical circuits, never place an extension cord across an area where people will be walking.

5. If there is a frayed or damaged electrical cord on any of the equipment you use, report it to the office immediately.

6. Be careful if you handle chemicals or other liquids. Clean up any spilled liquids immediately.

7. Always close all closet, desk, and file drawers as soon as you leave them.

8. Always be careful that your jewelry, neckties, scarves, or hair does not get caught in equipment, including computer printers.

9. Never open but one drawer of a file cabinet at one time. Always work from either side of the file cabinet, never in front of it.

10. If you smell something burning while working at a machine, always unplug it immediately.

PERSONAL GROOMING AFFECTS SAFETY

1. Hair that is longer than shoulder length causes accidents by getting caught in machinery.

2. Fingernails should be no longer than one-half inch for safety. Longer ones can get torn and broken.

3. Loose-flowing sleeves, scarves or ties, and dangling belts can get caught or wedged in office equipment.

4. Narrow heeled shoes present problems because they can get caught in carpeting and on stairs and can cause bad falls.

STOREROOM SAFETY PRECAUTIONS

1. If you have several small items to carry, either make several trips or get a dolly or carrier that will make it easier for you.

2. Do not strain your back! Learn to lift things by using your leg muscles instead of your back muscles, and if something is just absolutely too heavy, call for help.

3. Use a ladder wisely when handling items. Balance yourself carefully. If necessary, have someone steady the ladder while you do the moving or lifting.

4. Arrange boxes on shelves so that the shelves do not bow in the center. If boxes must be stacked, put the lighter, smaller ones on top.

5. Always get the proper equipment if you must move heavy furniture or file cabinets.

WORKING AFTER HOURS

There are several guidelines to follow if you MUST work late. Be sure to tell someone you will be at the office late and what time you expect to leave.

1. Work in a highly illuminated area.

2. Work near a telephone.

3. Have emergency numbers in front of you just in case you need them.

4. Lock all doors as you enter the office and secure all windows.

5. When leaving the building, call security and tell them you are leaving.

6. Ask someone to walk with you to your car.

7. Move your car as close to the building as possible.

As an employee of the company, you must take the responsibility for knowing these things:

1. Know where all fire extinguishers are located and how to operate them.

2. Know where all fire and smoke alarms are located, where the sprinkler systems are, and where there is an ample supply of water.

3. Be familiar with all emergency exits and memorize your fire escape plan.

4. Know the location of exit stairs, elevator locations and capacity.

5. Have at least three plans mapped out for building evacuation in case of emergency.

ACTIVITY SHEET 1--EXPLAINING SAFETY RULES

irections: Answer each of the following questions in the space provided.

1. Explain how to plug and unplug electrical equipment.
2. What does frayed or damaged electrical cords mean?
3. How can accidents be prevented?
4. Why should we follow safety rules?
5. List the steps to take in case of an accident.
6. Why should you clean spilled liquids from the floor?
7. What does accident-prone mean and how can you avoid being accident-prone?

ACTIVITY SHEET 2--OSHA/NIOSH PROVISIONS

A. List the reasons for the Occupational Safety and Health of 1970.

    1.

    2.

    3.

    4.

    5.

B. What do the letters "NIOSH" stand for?

C. When was it established?

D. What are the duties of NIOSH?

ACTIVITY SHEET 3--FIRE SAFETY

1. Seared or charred skin is considered a _____________ degree burn.
2. If skin is blistered, it is considered a _____________ degree burn.
3. If skin is reddened only, it is a _____________ degree burn.
4. What degree burns should receive immediate medical treatment?
5. Describe the three types of fires.
6. Where is the fire extinguisher closest to your room?
7. What type of fire extinguisher is the one closest to your room?
8. On what types of fires can you use the extinguisher closest to your room?
9. List the five types of fire extinguishers and tell on what types of fires the extinguisher can be used.
10. What type of treatment should be used on a first degree burn?
11. What type of treatment should be used on a second degree burn?

ACTIVITY SHEET 4--SAFETY ATTITUDES FOR THE OFFICE

Directions: Select proper attitudes by placing a T for true and an F for false in the space provided at the left of each statement.

____ 1. The reason someone usually gets hurt is due to carelessness.

____ 2. Safety applies only when you are operating office machines.

____ 3. One of 27 office workers is injured on the job every year.

____ 4. Injuries should be reported at once.

____ 5. Accidents don't happen; they are usually caused by people.

____ 6. Only the company is responsible for safety, not the employees.

____ 7. Only 50 percent of office accidents result from unsafe actions by employees.

____ 8. Goals for safety should be clean work areas, use of safeguards, and following safety rules.

____ 9. Clean machines while they are in operation.

____ 10. Never open two file drawers at the same time.

____ 11. Typewriters and computers never cause fires.

____ 12. Ask questions if in doubt about how to do a job in a safe manner

____ 13. Use tools and equipment only for their purpose.

____ 14. Wear the clothing that is correct for the job.

____ 15. Always lift by using your leg muscles.

____ 16. Safety includes proper clean-up and equipment maintenance.

____ 17. It is not your responsibility to clean up spills that you have made.

____ 18. You should tell others if you see them doing something incorrectly or without the proper safety equipment.

____ 19. It takes two people to operate the paper cutter.

____ 20. Safety rules posted on machines are for anyone who uses that machine.

ANSWERS TO ACTIVITY SHEETS

ACTIVITY SHEET 1

Information should include the following general knowledge.

1. Hold the electrical plug rather than the cord to plug or unplug machines.
2. Electrical cords with exposed wires
3. Being safety conscious
4. To keep from getting hurt and to protect others
5. Turn off power, administer first aid, report all accidents and injuries, take injured person to the hospital emergency room
6. Because spilled liquids can cause serious falls if they are on the floor
7. Accident-prone is the feeling or belief that some people are more likely than others to have accidents.

ACTIVITY SHEET 2

A. 1. The guarantee of safe working conditions for every person
   2. The reduction of hazards by providing new or improved safety and health standards and programs
   3. The development and enforcement of mandatory job safety and health standards
   4. Keeping records of job-related injuries and illnesses for evaluation
   5. The establishment of employer and employee responsibilities

B. National Institute for Occupational Safety and Health

C. 1970

D. 1. To conduct research on safety problems
   2. To provide technical assistance to OSHA
   3. To recommend standards for adoption by OSHA
   4. To publish safety material
   5. To inspect work places and request medical examinations in order to gain information on working conditions

ACTIVITY SHEET 3

1. T
2. F
3. T
4. T
5. T
6. F
7. F
8. T
9. F
10. T
11. F
12. T
13. T
14. T
15. T
16. T
17. F
18. T
19. F
20. T

ACTIVITY SHEET 4

1. third
2. second
3. first
4. third
5. Class A--combustible materials
   Class B--flammable materials
   Class C--electrical
6. Evaluated to the satisfaction of the instructor
7. Evaluated to the satisfaction of the instructor
8. Evaluated to the satisfaction of the instructor
9. Foam--Class A and B
   Carbon Dioxide--Class B and C
   Soda Acid--Class A
   Ordinary Dry Chemical--Class B and C
   Multipurpose Dry Chemical--Class A, B, and C
10. cold water
11. cold water and sterile gauze

UNIT TEST

A. Fill in the blanks with the correct response.

1. Flammable liquids or grease such as gasoline is a class _____ fire.
2. Ordinary combustibles such as wood is a class _____ fire.
3. Electrical equipment such as motors is a class _____ fire.
4. Reddened skin is a _________ degree burn.
5. Charred or seared skin is a ________ degree burn.
6. Blistered skin is a ________ degree burn.

B. List the five types of fire extinguishers.

1.

2.

3.

4.

5.

C. Select the correct rules associated with fire safety by placing a T for true or an F for false in the blanks at the left.

____ 1. Know how to leave a building during a fire.

____ 2. Only doctors need to know how to treat burns.

____ 3. Give a fire the chance to go out on its own before reporting it.

____ 4. You should practice fire prevention.

____ 5. To know what type materials are burning in a fire is not important to the person puttin gout the fire.

____ 6. Know how to use a fire extinguisher.

____ 7. Keep a clean work area with flammables stored properly.

____ 8. A multi-purpose dry chemical fire extinguisher can be used safely on all classes of fire.

____ 9. An ordinary dry chemical fire extinguisher can be used only for Class A and Class B fires.

____ 10. A foam fire extinguisher can be used for Class B and Class C fires.

D. Match the safety terms to their definitions by placing the correct letter in the blanks at the left.

____ 1. Accident

____ 2. Accident-prone

____ 3. Emergency

____ 4. Hazard

____ 5. Unsafe act

____ 6. Unsafe condition

____ 7. Safety

____ 8. Shock

a. the feeling or belief that some people are more likely than others to have accidents

b. a source of danger

c. the feeling or effect caused by an electric current passing through the body

d. something that is not free from danger

e. freedom from danger, risks, or injury

f. an unplanned event which could cause an injury

g. a situation that could lead to an accident

h. a condition that calls for immediate action

E. Answer the following statements true or false by placing a T for true or an F for false in the space at the left.

____ 1. Most accidents are caused by being careful.

____ 2. "Clowning around" makes you more accident-prone.

____ 3. Hand tools should be properly stored.

____ 4. Spilled liquid should be spread evenly on the floor.

____ 5. Do not sit or lean on tables.

____ 6. To unplug electrical equipment, pull the cord.

____ 7. Do not overload electrical outlets.

____ 8. Keep all filing drawers or desk drawers opened when not in use.

____ 9. Check electrical cords for frayed, tangled, or damaged cords.

____ 10. Do not get involved in any horseplay.

F. Answer the statements below concerning rights and responsibilities by writing T for true or F for false in the blanks.

____ 1. It is the employer's responsibility to inform employees of their rights under the OSHA Act.

____ 2. Employers must refrain from discrimination against employees who use their rights.

____ 3. Employees should not question safety rules even if they don't understand them.

____ 4. An employee has the right to request that an inspection be made.

____ 5. Employees don't need to report unsafe situations because the inspection will discover them.

____ 6. It is the employee's responsibility to follow safety instructions.

____ 7. An employer is allowed to be present during an inspection.

____ 8. Employees are allowed to help set safety and health standards that are needed at work.

G. Point out whether the following statements are the rights or the responsibilities of employers or employees by placing the correct number of each shown below in the blank to the left.

(1) Employer's responsibilities

(2) Employer's rights

(3) Employee's responsibilities

(4) Employee's rights

____ a. To be told the reason for inspection.

____ b. Require employees to use personal protective equipment.

____ c. Read OSHA posters at the job site.

____ d. Post OSHA citations at the work place.

____ e. To see that the employer corrects the unsafe conditions.

____ f. To be present during inspections and discussions.

____ g. Take safety seriously and don't "horse around."

____ h. To expect the employer to be concerned about the safety of employees.

____ i. Question things that are not understood.

H. Match the terms on the right with the definitions by filling in the blanks with the correct number.

____ a. A visit to a work place to identify unsafe conditions

____ b. A measure established by OSHA as an example of safe working conditions

____ c. Occupational Safety and Health Act

____ d. A notification by OSHA that a safety factor is not up to the set standards

____ e. National Institute of Occupational Safety and Health

____ f. Punishment for not following OSHA safety standards

(1) OSHA

(2) NIOSH

(3) Inspection

(4) Penalty

(5) Citation

(6) Standard

I. Point out the reasons citations are issued by OSHA by circling the letter of the correct statements.

a. Maintaining records

b. Failing to post OSHA standards

c. Giving false information

d. Reporting an accident or death

e. Fixing tools and equipment to meet safety standards

f. Failure to post a notice in an unsafe or dangerous area

TEST

J. Fill in the blanks with the word or words that best complete the statements concerning NIOSH.

a. NIOSH was established by the OSHA __________ of __________.

b. NIOSH is an agency of the Department of ________________.

c. One of the duties of NIOSH is to conduct research on ________ problems.

d. NIOSH provides technical assistance to ________________.

e. NIOSH recommends ________________ for adoption by OSHA.

ANSWERS UNIT TEST

A. 1. B
2. A
3. C
4. first
5. third
6. second

B. 1. multi-purpose dry chemical
2. ordinary dry chemical
3. foam
4. carbon-dioxide
5. soda acid

C. 1. T
2. F
3. F
4. T
5. F
6. T
7. T
8. T
9. F
10. F

D. 1. f
2. a
3. h
4. b
5. d
6. g
7. e
8. c

E. 1. F
2. T
3. T
4. F
5. T
6. F
7. T
8. F
9. T
10. T

F. 1. T
2. T
3. F
4. T
5. F
6. T
7. T
8. F

G. a. (2)
b. (1)
c. (3)
d. (1)
e. (4)
f. (2)
g. (3)
h. (4)
i. (3)

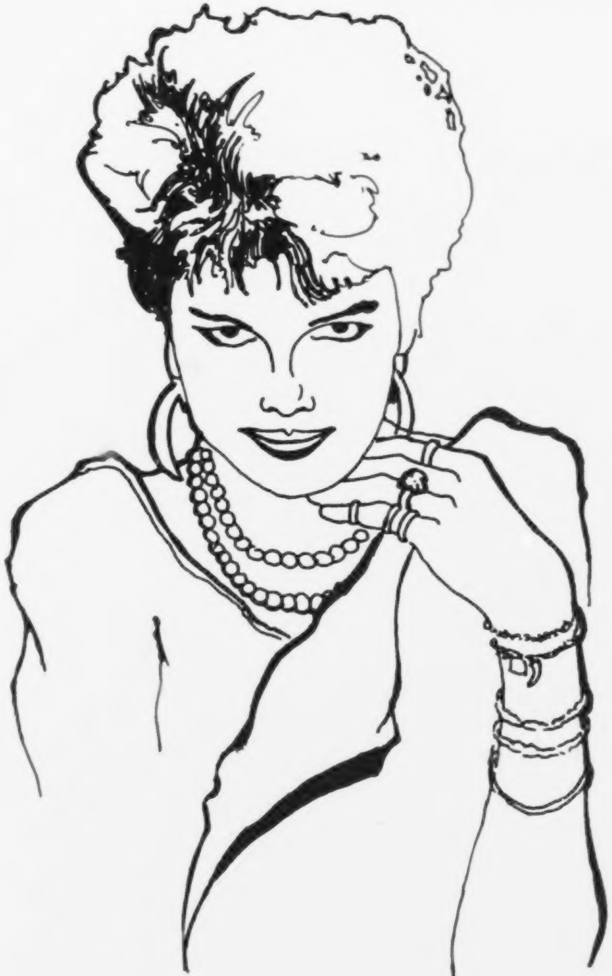
H. a. (3)
b. (6)
c. (1)
d. (5)
e. (2)
f. (4)

I. a.
b.
c.
d.
e.
f.

J. a. Safety Act of 1970
b. Human Services
c. Safety
d. OSHA
e. Standards

ANSWERS TO TEST

REMOVE UNSAFE JEWELRY AND CLOTHING



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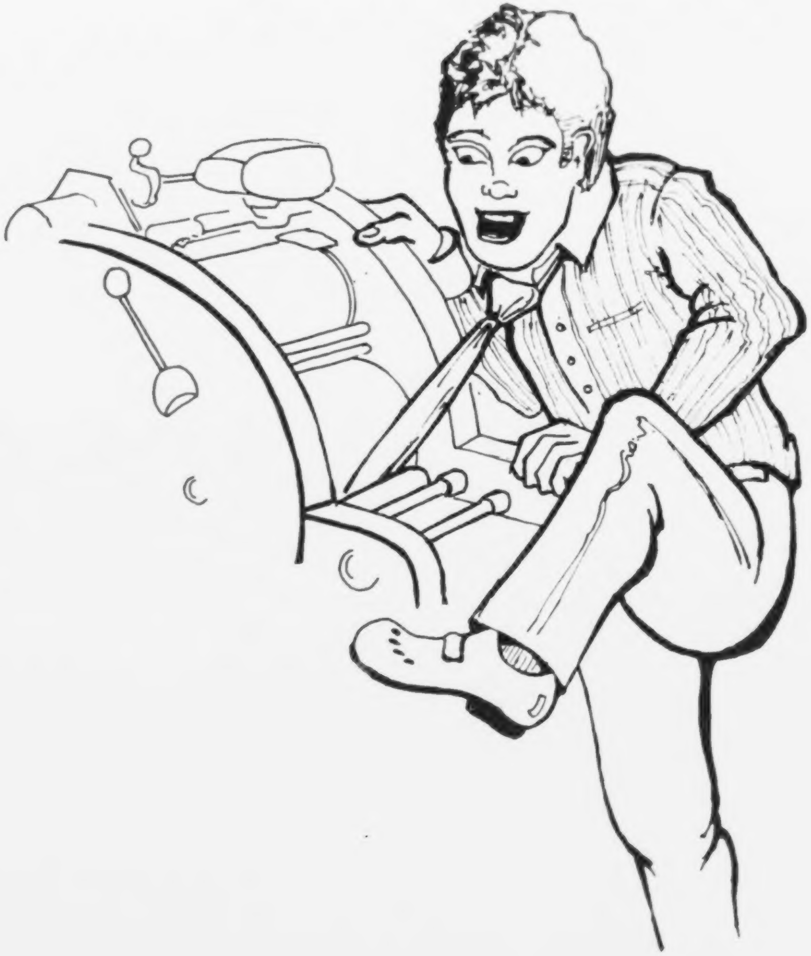

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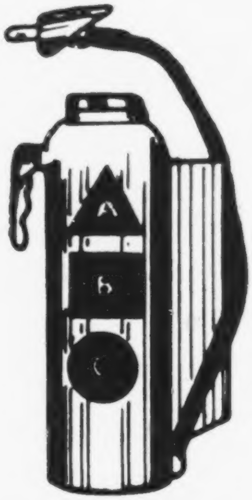
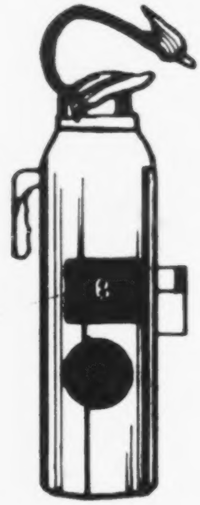
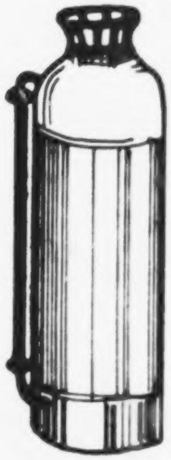
TYPES OF FIRE EXTINGUISHERS



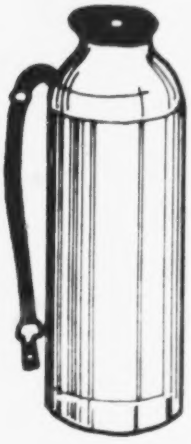
MULTI-PURPOSE
DRY CHEMICAL



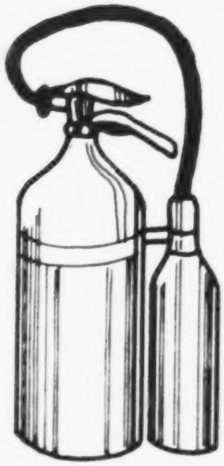
ORDINARY
DRY CHEMICAL



SODA ACID

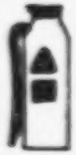
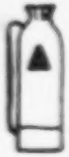
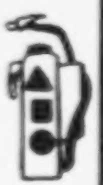
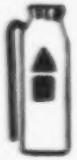
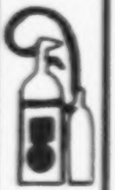
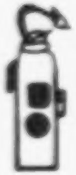
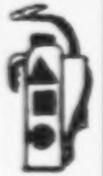
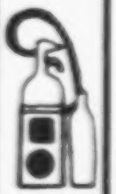
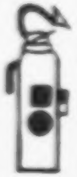
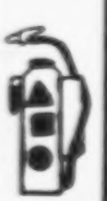


FOAM

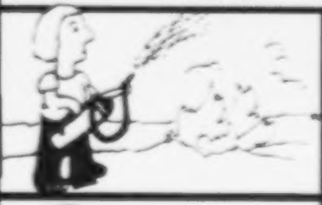
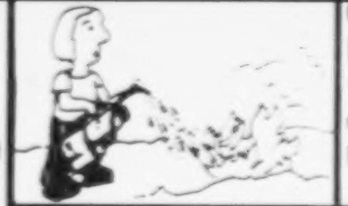
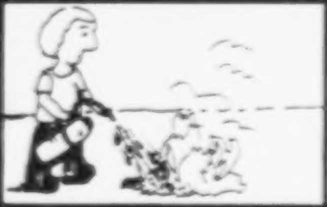
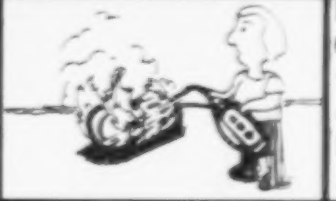
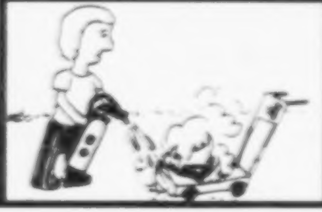


CARBON DIOXIDE

KNOW YOUR FIRE EXTINGUISHER

DECIDE THE CLASS OF FIRE YOU ARE FIGHTING	TYPE OF EXTINGUISHER				
	FOAM	CARBON DIOXIDE	SODA ACID	ORDINARY DRY CHEMICAL	MULTI-PURPOSE DRY CHEMICAL
A WOOD PAPER CLOTH ETC.					
B GASOLINE PAINTS OILS					
C MOTORS SWITCHES					

HOW TO OPERATE

	**FOAM:** Don't spray the stream into the Burning Liquid. Allow Foam to Fall Lightly on Fire.
	**CARBON DIOXIDE:** Direct Discharge as Close to Fire as Possible. First at Edge of Flames and Gradually Forward and Up.
	**SODA-ACID:** Direct Stream at Base of Flames.
	**MULTI-PURPOSE DRY CHEMICAL:** Direct at Base of flames. In the Case of Class A Fires, Follow Up by Directing the Dry Chemicals at Remaining Flames.
	**ORDINARY DRY CHEMICAL:** Direct at Base of Flames.

TELEPHONE TECHNIQUES

75.89(a)(3)(a) OFFICE EDUCATION ESSENTIAL ELEMENT
EFFECTIVE COMMUNICATION

Identify and use correct techniques when using the telephone for business purposes

TELEPHONE TECHNIQUES

UNIT OBJECTIVE

After completion of this unit, the student will be able to identify and use equipment, proper procedures, and correct techniques when using the telephone for business purposes. This knowlege will be evidenced through demonstration and by successfully completing the unit test.

SPECIFIC OBJECTIVES

1. State three basic techniques when using the telephone.
2. List the tips to follow when making calls.
3. Identify types of telephone services available.
4. List the three parts of a telephone directory.
5. Demonstrate the ability to:
    a. Handle telephone inquiries
    b. Plan and place a call
    c. Record messages
    d. Use the telephone directory

TEACHER ACTIVITIES

1. Obtain brochures; booklets; films; and teletrainer, if possible, from the telephone company.
2. Design special bulletin board on telephone equipment or telephone techniques.
3. Secure an employer from the business community to speak on telephone techniques.
4. Discuss the unit objectives so that students will have an understanding of what is expected of them.
5. Discuss each of the various techniques and stress the importance of developing correct techniques.
6. Discuss telephone procedures, services, equipment, and directions.

STUDENT ACTIVITIES

1. Role-play with the teletrainer.
2. Use tapes and Activity Sheets from Telephone Dynamics.
3. Complete Activities from Business Telephone Unit of Communications, OCL.

EVALUATION- Unit I Test, Communications, OCL

ESTIMATED COMPLETION TIME – 5-10 hours

UNIT OUTLINE

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the Resources Section

RESOURCES

BUSINESS TELEPHONE ETIQUETTE
Slide-Tape Presentation
(Includes teacher's guide, student booklet and competency tests)
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

COMMUNICATING ON THE JOB
Film, Cassettes, Teacher Manual
Career Aids, Inc.
20417 Nordhaff Street, Dept. C-7
Chatsworth, CA 91311

COMMUNICATIONS STUDY GUIDE, UNIT I
Telephone Techniques
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

OFFICE COMMUNICATION
Filmstrips, Trainee Work Plan
Prentice-Hall Media
Service Code H
150 White Plains Road
Tarrytown, NY 10591

SOUTHWESTERN BELL AIDS TO EDUCATION PROGRAM
Southwestern Bell Telephone Company
Room 2204
308 South Akard
Dallas, TX 75202

TELEPHONE COMMUNICATIONS
Prentice-Hall Media, Service Code H
150 White Plains Road
Tarrytown, NY 10591

TELEPHONE DYNAMICS
Western Tape
2761 Marine Way
P. O. Box 69
Mountain View, CA 94040

TELEPHONE TECHNIQUES
Milady Publishing Company
3839 White Plains Road
Bronx, NJ 10467

75.89 (a)(3)(A)

OBJECTIVE: The student will be able to identify and use equipment, proper procedures, and correct techniques when using the telephone for business purposes.

	MASTERY	NON MASTERY
1. State three basic techniques when using the telephone.		
2. List the tips to follow when making calls.		
3. Identify types of telephone services available.		
4. List the three parts of a telephone directory.		
5. Demonstrate the ability to:		
a. Handle telephone inquiries		
b. Plan and place a call		
c. Record messages		
d. Use the telephone directory		

PERFORMANCE CHART

I. GENERAL INFORMATION

The telephone is an invaluable tool in today's business office. Equipment is updated frequently. Operating a telephone correctly is much more than just pressing a button or dialing the numbers. You must keep abreast of how many buttons to press and when to press them. This unit contains a description of the latest equipment and services provided by the telephone companies.

It is not always what you say, but how you say it, that plays an important part in a telephone conversation. Many business transactions are made through telephone conversations. You probably feel that you are familiar with the telephone because you use it daily, but there are still a number of ways to help you improve your telephone communication. The proper use of the telephone improves the image of the individual and the company. The impression that is communicated to a listener is not through facial expressions or gestures, but through the voice and response of the caller. Good telephone etiquette and diplomacy used in communicating over the telephone are important to every individual and business.

II. TEACHING TECHNIQUES

A. Using telephones

1. The teletrainer, which can be borrowed or rented on a temporary basis from the telephone company, allows students to practice "live" telephone conversations while practicing and developing telephone skills. It consists of two activated telephones and a loudspeaker that can be recorded. Contact the educational representative or the local manager of the telephone company to arrange for the use of the Teletrainer.

2. Occasionally, used telephone equipment can be obtained from government surplus sales agencies or from commercial dealers in your area. The main advantage is that the telephone equipment becomes a permanent feature in the classroom.

B. Role-playing

1. Students can be given practice cases for role-playing conversations. These cases can be prepared by the teacher or by the students or can be obtained from text sources such as AT&T's Role-Playing--Student Supplement, Teletrainers for Business Studies.

2. Students may role play a situation in which they telephone to make an appointment for a job interview.

3. Students should be given practice in planning calls; the teacher can describe a "situation" to the class and ask each student to plan the information to be given by telephone to handle the situation.

C. Analyzing and evaluating practice calls

1. Students could tape-record some of their conversations for playback so that they can hear themselves and analyze their telephone personalities and techniques.

2. The students could be provided with a prepared evaluation form for analyzing their own or other classmates' telephone conversations, or the class may prepare a checklist of items to listen for when analyzing conversations.

D. Using class discussion--Class discussion can be used to emphasize techniques of telephoning, to plan calls, and to analyze and evaluate conversations.

E. Using films--Films may be used to introduce the telephone unit or to provide a review of telephone techniques. Excellent films are available on a free loan basis from your local telephone company.

NOTES TO THE INSTRUCTOR

F. Other suggestions

1. Telephone Dynamics is a excellent source for telephone training. Students listen to tapes, fill in assignment sheets, and practice recording on cassettes.

2. A suggestion for telephone technique reinforcement is to assign one student as receptionist during your individualized units. This student can answer the telephone while you are available for one-on-one instruction.

III. UNIT OVERVIEW

A. Telephone techniques

1. Discuss each of the various techniques listed.

2. Stress the importance of developing correct techniques.

3. Provide examples of ways to project a good image and to develop an effective voice when using the telephone.

4. Arrange for an employer to speak to the class on the importance of using correct telephone techniques.

B. Telephone tips

1. Discuss each of the tips to follow when making calls.

2. Provide examples to facilitate the discussion.

C. Telephone procedures

1. Discuss each of the procedures to follow when using the telephone.

2. Have students complete activities from Business Telephone Techniques unit of Communications, OCL, or other resources available.

3. Have students apply these procedures when role-playing using the teletrainer.

   a. Have students role-play various types of situations in the activity book provided with the teletrainer.

   b. Have students prepare role-playing situations based on actual experience or from information obtained from employers.

   c. Provide additional activities, if necessary.

D. Telephone services

1. Discuss each of the telephone services provided.

2. Provide examples of how each of these services might be used in an office.

E. Telephone equipment

1. Discuss the various types of telephone equipment available.

2. Use the brochures and pictures obtained from the telephone company to illustrate the equipment.

3. Arrange for the telephone representative to speak to the class on telephone services and equipment.

4. Arrange for the students to visit the telephone company to view the equipment available.

F. Telephone directories

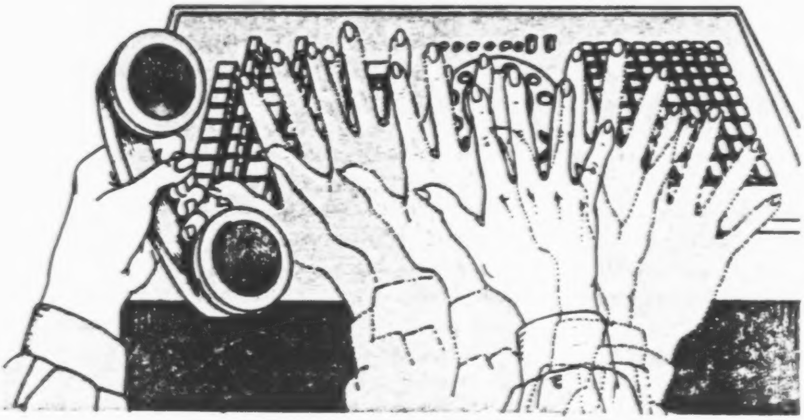
   1. Discuss the various uses of telephone directories.
   2. Discuss the organization of the telephone directory.
   3. Provide examples of each type of directory.

IV. UNIT TEST

A. Various methods may be used for administering the test.

   1. It may be used as an additional activity sheet.
   2. Each part may be given as the information is completed.
   3. The test may be given upon completion of the entire unit.

B. Add test parts for any information added to the unit.



I. TELEPHONE TECHNIQUES

A. Establish good office organization.

   1. Have easy access to:

      a. Pad and pencil

      b. Telephone directories

      c. Reference materials

   2. Maintain and use a list of frequently called numbers.

   3. Designate a place for leaving messages.

   4. Know how to use the telephone services and equipment.

B. Project a good telephone image.

   1. Use businesslike phrases instead of slang.

   2. Avoid using technical expressions which may confuse the caller.

   3. Be a good listener.

   4. Take accurate notes.

   5. Avoid talking to others while a person is waiting on a line.

   6. Always acknowledge requests.

   7. Show interest by using the caller's name.

   8. Be tactful.

   9. Return calls promptly.

   10. Apologize for any errors or delays.

C. Develop an effective telephone voice.

   1. Put a smile in your voice by using polite phrases.

   2. Show a sincere interest in the caller.

   3. Speak clearly and distinctly. Do not chew gum, eat food, or smoke when talking on the telephone.

   4. Vary the tone of your voice.

   5. Talk directly into the transmitter.

   6. Talk at a moderate rate.

II. TELEPHONE TIPS

A. Use the telephone for urgent, brief messages that require discussion.

B. Avoid using the telephone for long, detailed messages, lists of figures, or other complex information.

C. Prearrange for the party you are calling to have detailed information on hand before you call.

D. Resist the temptation to make "small talk."

E. Prearrange a schedule of times to call branch offices.

F. "Save up" messages for one or two calls to branch offices every day.

G. Call earlier time zones (e.g., PST) during early evening hours, and late time zones (e.g., EST) during early morning hours in order to save money.

H. Use Direct Distance Dialing for long calls when possible.

III. TELEPHONE PROCEDURES

A. Receiving calls

   1. Answer the telephone promptly and with a smile.

      a. Answer the telephone on the first ring whenever possible.

      b. Depress the proper line button before lifting the receiver.

   2. Identify yourself.

      a. Identify the name of your company or department first, then give your name.

      b. Speak clearly and distinctly.

   3. Explain when you leave the line and return promptly.

      a. Tell the caller why you must leave the line.

b. Give the caller the option of waiting or having you return the call.

c. Use the Hold button, if available, or carefully lay the handset down on the table.

d. Return to the line frequently to give the person a progress report.

e. Get the caller's attention when you return to the line.

4. Transfer calls only when necessary.

a. Explain to the caller why the call is being transferred and to whom.

b. Offer to have the party return the call if the caller does not want to be transferred.

c. Use the correct procedures for transferring calls.

5. Terminate calls courteously.

a. Say "goodbye" pleasantly.

b. Let the caller hang up first.

c. Replace the receiver gently and securely.

B. Answering calls for others.

1. Explain co-worker's absence from the office.

a. Be tactful and avoid giving the wrong impression.

b. Do not give out unnecessary information.

c. Create a good image of the person for whom you are taking the call.

2. Be helpful.

a. Offer assistance to the caller.

b. Give the approximate time co-worker will return.

3. Take accurate messages.

a. Keep a pad and pencil handy at all times.

b. Use a telephone message form to record telephone calls accurately.

c. Record the following information on the form.

(1) Date and time of call

(2) Caller's name, name of company, and number

(3) Message

(4) Your name or initials

C. Placing calls

1. Be sure of the number before placing the call.

2. Plan the call in advance.

a. Know the person you want to reach.

b. Know what you want to say.

c. Know what you want to accomplish with the phone call.

3. Time your call carefully.

a. Call when the party is most likely to be available.

b. Do not place a call during regularly scheduled lunch hours unless the call has been prearranged.

c. Remember time zones when calling long distance.

4. Place the call.

a. Depress a clear line button; then lift the receiver.

b. Dial or depress each digit carefully.

5. Identify yourself immediately.

6. State the purpose of your call and give the name of the person to whom you wish to speak.

IV. TELEPHONE SERVICES

A. Conference calls

1. Can talk to many people--each in a different location--on one call.

2. Planned in advance so that everyone can be reached

3. Arranged through the telephone operator according to the following steps:

   a. Indicate you want to make a conference call.

   b. List the names and numbers you want to call.

   c. Specify the date and time you wish the call to occur.

   d. Ask the operator to confirm the call when it has been arranged.

B. International calls

1. Used for calls made overseas

2. Direct dialed from areas equipped for international calling following these steps:

   a. Dial the International Access Code, 011.

   b. Dial the country code listed in the front part of the telephone directory.

   c. Dial the city code obtained from the operator

   d. Dial the local number.

3. Placed through the telephone operator from areas without international dialing service following these steps:

   a. Tell the operator you want to make an overseas call.

   b. Give the name of the country, city, and telephone number.

C. Wide Area Telecommunications Service (WATS)

1. Enables the subscriber to place unlimited number of calls up to a maximum number of usage hours for one monthly charge

2. Offers five geographic service areas, depending upon the needs of the business, from which to choose

3. Is a cost-effective way for businesses to operate

4. Available in two types of WATS lines

   a. Inward WATS

      (1) Enables the company to receive calls from anyone within the service areas selected

      (2) Allows customers to make calls to the company by dialing the toll-free 800 prefix rather than the area code.

   b. Outward WATS

      (1) Enables the subscriber to make calls to any telephone in the service area selected

      (2) Computes charges based on the prevailing WATS rate rather than the long distance rate

D. Credit card

1. Enables the card holder to make calls from any telephone in the U.S. or Canada to any other city, state, or country

2. Provides a record of telephone expenses

3. Necessitates placing the call through the operator

E. Person-to-Person

1. Used when you wish to talk with a particular person or extension

2. Costs more than a station-to-station call

3. Arranged through the operator

F. Dial One-Plus (station-to-station)

1. Used when you will talk with whomever answers the telephone

2. Costs less than any other call

3. Allows the caller to place the call without going through the operator; the call is palced by following these steps:

   a. Dial the digit 1 plus the area code (if different from your own)

   b. Dial the number you are calling

G. Bill to third number

1. Used to place calls and transfer the charge to another telephone number

2. May be either a station-to-station or person-to-person call

3. Requires operator assistance

V. TELEPHONE EQUIPMENT

A. Switchboard equipment

1. Private Branch Exchange System (PBX)--operated by a central operator who answers all incoming calls and connects the caller to the proper extension

2. Private Automatic Branch Exchange System (ABX)--can be operated without the assistance of an operator; calls are automatically answered and transferred to the proper extension. Several features are offered with the system

B. Key telephone systems

1. Operated through push-buttons which are connected to several telephone lines

2. Has the capabilities of accommodating from two to 25 lines on one system

C. Automatic answering device

1. Used to answer unattended telephones

2. Answers and records messages on tape

D. Intelligent dialers

1. Equipped to automatically dial numbers for you

2. Eliminates looking up numbers or redialing long numbers (Frequently called numbers are stored in the system's memory.)

VI. TELEPHONE DIRECTORIES

A. Purposes of directories

1. Provide telephone numbers to be called

2. List businesses by type

3. Furnish a source to check names

4. List the types and uses of telephone services available

B. Parts of a telephone directory

1. Introductory pages--provide the following information:

   a. Emergency numbers

   b. ZIP codes for surrounding areas

   c. Information regarding services, equipment, rates, etc.

   d. Instructions for placing calls

   e. Area codes for some cities

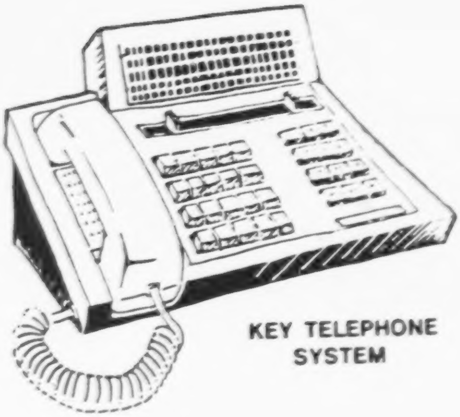
2. Alphabetical directory (white pages)

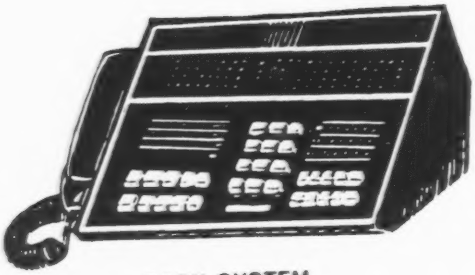
   a. Contains the name, address, and telephone number of each subscriber

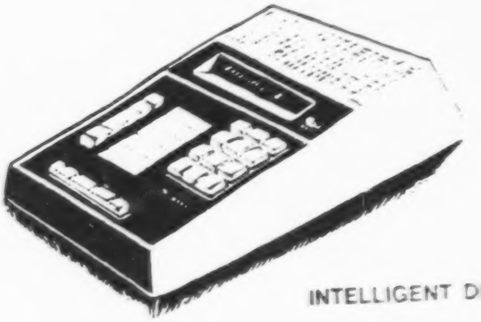
   b. Arranged alphabetically by the subscriber's last name

3. Classified directory (yellow pages)
    a. Arranged alphabetically by product or service
    b. Contains an alphabetical listing of business subscribers within each subject category
    c. Bound separately or placed at the back of the alphabetical directory

C. Personal directory
    1. Contains names and telephone numbers of frequently called persons or businesses
    2. Maintained and kept up to date by the secretary

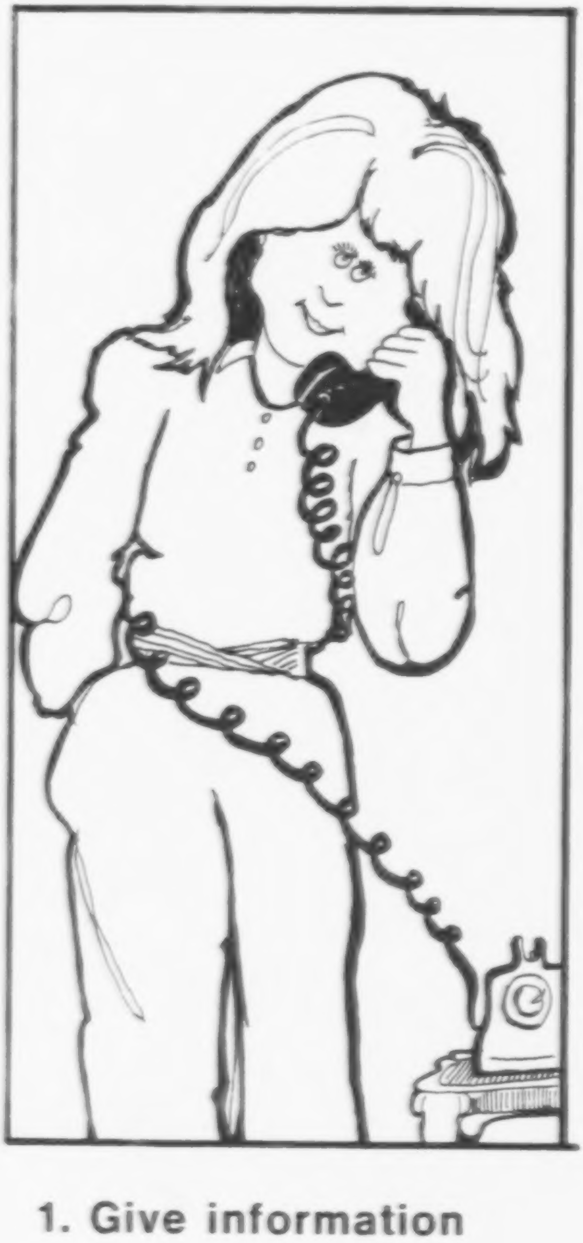

KEY TELEPHONE SYSTEM


PABX SYSTEM

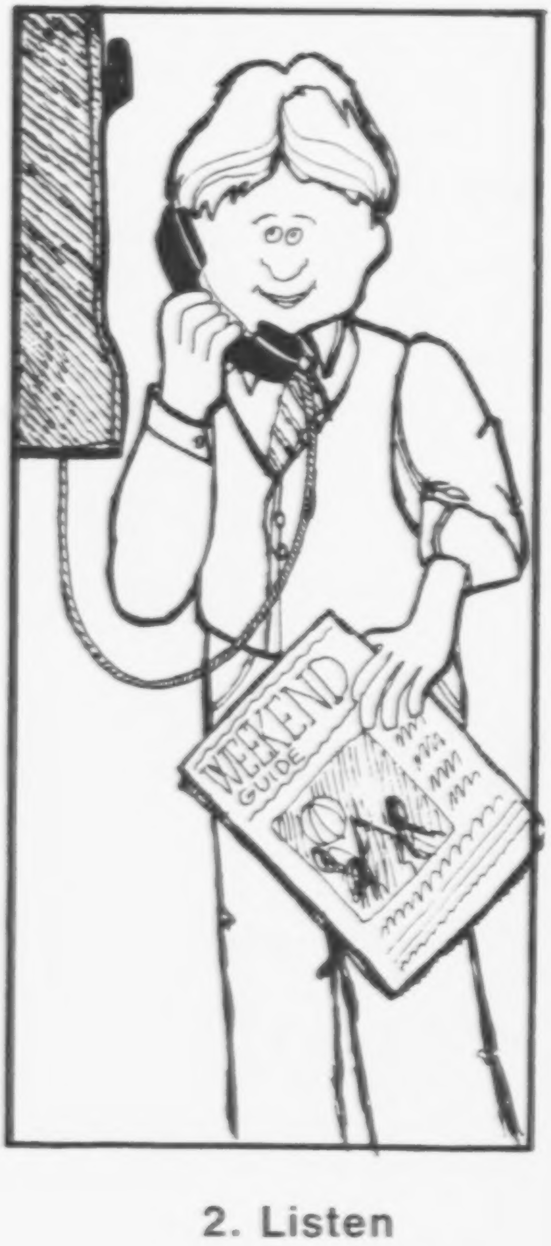

INTELLIGENT DIALER

COMMUNICATION

A TWO WAY PROCESS



1. Give information


WEEKEND
GUIDE

2. Listen

Message

For

From

Date Time

Phone No

Telephoned		Please call	
Called to see you		Will call again	

Message:

Call taken by

201

Message

For

From

Date Time

Phone No

Telephoned		Please call	
Called to see you		Will call again	

Message:

Call taken by

Message

For

From

Date Time

Phone No

Telephoned		Please call	
Called to see you		Will call again	

Message:

Call taken by

Message

For

From

Date Time

Phone No

Telephoned		Please call	
Called to see you		Will call again	

Message:

Call taken by

OFFICE CAREERS

75.89(a)(1)(b) OFFICE EDUCATION ESSENTIAL ELEMENT

Develop an understanding concerning careers in office occupations and levels of competency

OFFICE CAREERS

UNIT OBJECTIVE

The student will develop an understanding concerning careers in office occupations and levels of competency.

SPECIFIC OBJECTIVES

1. Identify correctly five occupations in the Business and Office Cluster.
2. State the duties, educational requirements, and training requirements for at least three office related occupations.
3. Be able to discuss knowledgably careers in office occupations.

TEACHER ACTIVITIES

1. Gather resource materials related to office careers.
2. Plan for a guest speaker who is employed in personnel for a large company to speak and give specific job descriptions of positions in his/her company.
3. Show filmstrips and slides obtained from vocational counselor to reinforce knowledge of office occupations.
4. Plan activities to give students application in identifying work tasks of office-related occupations.
5. Have students complete activities to meet objectives in a sequence best suited to your classroom.

STUDENT ACTIVITIES

1. Discuss the levels of competency necessary for entry-level positions in office related occupations.
2. Complete activities to give exposure to a variety of office related occupations.
3. Develop a realistic perception of the business world in office-related occupations by answering questions related to the information presented by guest speakers, media, and information gained through participating in visits to work sites.
4. Complete activities which portray simulated work tasks of office-related occupations.

EVALUATION - Unit Test

ESTIMATED COMPLETION TIME - 2-4 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simuluation materials from the resources section

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RESOURCES

ACCOUNTING AND DATA PROCESSING CAREERS
Southwestern Publishing Company
text, workbook

THE BOSS: BUSINESS AND OFFICE MICROCOMPUTER JOB SIMULATOR SERIES
Career Aids, Inc.
Bookkeeper: Apple II, IIe; TRS-80 Model III
File Clerk: TRS-80 Model III
Receptionist: Apple II, IIe; TRS-80 Model III
General Secretary: Apple II, IIe; TRS-80 Model III
Reservation Clerk: Apple II, IIe; TRS-80 Model III
Programmer: Apple II, IIe; TRS-80 Model III
Data Preparation/Entry Clerk: Apple II with keypad, Apple IIe with keypad; TRS-80 Model III

BUSINESS CAREERS
Southwestern Publishing Company
text, workbook

CAREER EXPLORATION
Southwestern Publishing Company
disk and student manual, documents and supplies for Apple II, IIc; TRS-80 Model III

CAREERS IN OFFICE SERVICES
Career Aids, Inc.
four sound filmstrips, educator's guide

CAREER SURVEYS
Career Aids, Inc.

MANAGING FOR SUCCESS: CAREER PLANNING
Career Aids, Inc.
Apple II, IIe, or IIc; IBM PC

RECOGNIZING SKILLS NECESSARY FOR EMPLOYMENT IN A BUSINESS OFFICE
Occupational Curriculum Laboratory
slide presentation

75.89 (a)(1)(B)

OBJECTIVE: The student will develop an understanding concerning careers in office occupations and levels of competency.

	MASTERY	NON MASTERY
1. Identify correctly five occupations in the Business and Office cluster.		
2. State the duties, educational requirements and training requirements for at least three office related occupations.		
3. Be able to discuss knowledgeable careers in office occupations.		

PERFORMANCE CHART

I. UNIT OUTLINE

A. Discuss the unit objective with the students.

B. Discuss each specific objective.

C. Have the students complete the objectives in a sequence best suited to your classroom.

D. Add any objectives necessary to meet fully the needs of the unit and the students.

II. UNIT OVERVIEW AND ACTIVITIES

A. Discuss the definition of the cluster and the concept of families.

B. Use TM-1--THE BUSINESS AND OFFICE CLUSTER to reinforce the cluster family concept.

C. Discuss the examples of occupations in each family.

D. Select activities to give students application in identifying occupations in the cluster.

E. Choose activities that will assist students in learning the work tasks of office-related occupations.

III. UNIT TEST--VARIOUS APPROACHES MAY BE USED IN TESTING

A. Give the entire test upon completion of the unit.

B. Give the first section as an additional assignment or to reinforce problem areas of learning.

WHAT IS THE BUSINESS AND OFFICE CLUSTER ?

I. It is a group of occupations grouped together because they are involved in managing and organzing support for the functions of businesses and offices.

II. Within the cluster, you can find occupations that can be narrowed further to smaller groups, often called job families.

JOB FAMILIES AND DEFINITIONS

I. Accounting--occupations involved in methods of keeping and explaining financial records

II. Computer--occupations involved in electronic data processing

III. Secretarial Science--occupations involved in record keeping, writing, editing, and taking dictation

IV. Management--occupations involved in planning and organizing personnel activities

V. Personnel--occupations involved in recruiting, interviewing, and hiring employees

VI. Clerical--occupations involved in supporting on-going office operations

EXAMPLES OF OCCUPATIONS

ACCOUNTING

Controller - (D.O.T. 186.117-014) Responsible for designing, maintaining, and evaluating a general accounting system for an organization (Also known as comptroller).

Accountant, Cost - (D.O.T. 160.167-018) - Installs and maintains systems for organization with procedures not ordinarily supported by standard accounting systems.

Accountant, Budget - (D.O.T. 160.167-014) - Estimates expenditures. Submits overall reports to management.

Accountant, Property - (D.O.T. 160.167-022) - Designs system to provide effective control. Identifies and keeps records of all company-owned or leased equipment, buildings, and other property.

Accountant, Certified Public (C.P.A.) Meets state legal requirements for public practice (education and experience). Usually has private practice specializing in income tax returns.

Accounting Clerk - (D.O.T. 216.482-010) - Performs variety of routine calculating, posting, and typing duties in accounting. Other related jobs are voucher clerk, payroll clerk, and typist.

Accountant, Systems - (D.O.T. 160.167-026) - Creates and installs special accounting systems for organizations which cannot use standardized system.

Bookkeeper - (D.O.T. 210.382-018) Keeps one section or set of financial records. Related jobs are accounts-receivable bookkeeper, Christmas-club bookkeeper, interest-accrual bookkeeper, safe-deposit-box bookkeeper, and savings bookkeeper.

Accountant, Tax - (D.O.T. 160.162-010) - Prepares federal, state, or local tax returns of individuals, business establishments, or other organizations. Specializes in specific phases of tax accounting.

Accountant, Machine Processing (D.O.T. 160.167-026) - Coordinates mechanized accounting operations. Confers with management to adapt accounting and record keeping systems to machine accounting processes.

Statistician - (D.O.T. 020.167-026) Discovers general facts. Interprets quantitative information by application of statistical methods to a mass of related individual observations in field of designated specialization. See also Marketing and Distribution cluster: Market Research and Analysis job family.

Mathematician - (D.O.T. 020.067-014) Determines mathematical principles involved and most efficient methodology for solutions of problems pertaining to accounting functions.

Trust-Savings Account Clerk - (D.O.T. 216.382-074) - Specializes in trusts, savings, mortgages, and legal transactions.

Accountant (manager, office) - (D.O.T. 160.167-010) - Plans and directs overall accounting program of organization.

Accountant, Budget - (D.O.T. 160.167-014) - Responsible for one entire phase of accounting system. Supervises personnel handling various phases of accounting.

COMPUTER

Systems Analyst, Electronic Data Processing - (D.O.T. 012.167-066) Analyzes business problems. Makes formulation and conversion to programmable form. Changes material to electronic data processing system.

Data Typist (Data Entry Typist) (D.O.T. 203.582-022) - Converts alphabetic, numeric, and symbolic data into coded form. Processes magnetic devices.

Teacher - Computer Science - (D.O.T. 019.277-010) - Instructs in specialized area of data processing on the secondary educational level.

Word Processing Operator - Transcribes material from dictating equipment, handwritten or typed copy. Using word processing equipment, prepares letters, reports, and other documents. Formats, proofreads, edits, and revises documents to produce error-free final copy.

Microcomputer Support Technician - Delivers and installs microcomputer systems. Offers continued support to client by diagnosing problems of computer systems.

Firmware/Software Engineer - Develops and programs software programs for computer systems.

Key-Punch Operator - (D.O.T. 203.582-030) - Prepares punched cards for overall operation. Proofs material before and after punched cards are prepared. Assists in designing card phase for specific job or project.

Computer Operator - (D.O.T. 213.362-010) Examines the programmer's instruction sheet for the run and ascertains procedure to be followed. Readies the equipment. If malfunction occurs, troubleshoots for basic cause of error.

Programmer, Business - (D.O.T. 020.162-014) - Converts scientific, engineering, and technical problem formulations to format processable by computer.

Data-Reduction Technician - (D.O.T. 020-162-010) - Analyzes new data recorded on magnetic devices, photographic film, and other media. Reduces raw data to meaningful and manageable terms. Translates data into numerical values, equations, flow charts, graphs, or other media.

Tape Librarian - (D.O.T. 206.387-030) Responsible for storing magnetic devices. Maintains control record on all magnetic devices. Organizes a filing system to fit the purpose of each project.

Quality-Control Technician - (D.O.T. 012.261-014) - Tests and inspects computers at various stages of production process to determine and maintain quality and reliability of product. Also verifies quality of appearance of computers.

Systems Engineer, Electronic Data Processing - (D.O.T. 003.167-062) Analyzes data processing needs to determine computer system that will provide system capabilities required for project or company. Plans layout of new system installation or modification of existing system and oversees installation of office automation hardware and software. Troubleshoots technical computer systems problems for customer.

SECRETARIAL SCIENCE

Secretary - (D.O.T. 201.362-030) - Takes dictation, schedules appointments, gives information to callers, and relieves officials of minor administrative and business details. May supervise clerical workers.

Legal Secretary - (D.O.T. 201.362-010) Prepares legal papers and correspondence of a legal nature, such as summonses, complaints, motions, and subpoenas. Requires specialized knowledge and training in the field of law.

Social Secretary - (D.O.T. 201.162-010) Coordinates social, business, and personal affairs of employer. Reads and answers routine correspondence, using typewriter or in own handwriting as situation demands. May manage financial affairs of entire house.

Supervisor, Steno Pool - (D.O.T. 202.132-010) - Supervises and coordinates activities of workers engaged in taking and transcribing dictation of correspondence and reports.

Stenographer - (D.O.T. 202.362-014) Takes dictation in shorthand of correspondence, reports, and other matters, and operates typewriter to transcribe dictated material. May perform a variety of clerical duties.

Medical Secretary - (D.O.T. 201.362-014) Performs secretarial duties such as dictation, transcribing, and typing, utilizing knowledge of medical terminology and hospital, clinic, or laboratory procedures.

Court Reporter (Shorthand Reporter) (D.O.T. 202.362-010) - Records examination, testimony, judicial opinions, and other legal records by machine shorthand.

Court Clerk - (D.O.T. 243.362-010) Keeps records of county and handles court dockets. Coordinates records between clerk's office, attorney's office, and court. Assists court reporters in various phases of their work. Handles jury summonses, records. Maintains court appeal record for court. Processes all legal papers for court. May work through related offices, such as district clerk's office.

MANAGEMENT

Manager, Industrial Organization (D.O.T. 189.117-022) - Directs and coordinates activities of industrial organization to obtain well-run operation and to ensure profits. Plans, develops, and puts into effect business policies and goals. Supervises department managers.

Management Trainee - (D.O.T. 189.167-018) - Performs job duties concerned with or pertaining to the conducting of business affairs within a business under supervision to gain knowledge and experience required for promotion to management positions.

Public Relations Representative (D.O.T. 165.067-010) - Plans and conducts programs designed to secure publicity for a business or client.

Supervisor - Handles people or directs activities of others. Works through people to accomplish productive work.

Faculty Member, College or University (D.O.T. 090.227-010) - Conducts college oruniversity courses for undergraduate or graduate students in business and management (Also see Public Service cluster.)

Training Representative - (D.O.T. 166.227-010) - Prepares and conducts training programs in organization.

General Manager (Production Superintendent) - (D.O.T. 183.117-014) Directs and coordinates, through supervisory personnel, activities concerned with the production of company products. Utilizes knowledge of product technology, production methods and procedures, capabilities of machines and equipment, and management practices.

Assistant Manager - Assists manager by performing similar duties and by assuming authority and responsibilities of manager during manager's absence. Supervised by manager.

Consultant (Management) - (D.O.T. 189.167-010) - Analyzes problems in management. Conducts studies and surveys to obtain data. Analyzes data to advise on or recommend solution to a management problem. Writes follow-up reports.

PERSONNEL

Supervisor, Personnel Clerks - (D.O.T. 209.132-010) - Supervises and coordinates activities of workers engaged in compiling and maintaining personnel records.

Employment Interviewer - (D.O.T. 166.267-010) - Interviews job applicants. Evaluates people for special jobs. Verifies written reports and test data for possible qualifications.

Personnel Recruiter - (D.O.T. 166.267-010) Travels to geographically distant areas from company's operations. Interviews applicants for position openings.

Investigator (Personnel) - (D.O.T. 241.267-030) - Checks and verifies background of person applying for job. Compiles detailed report of findings.

Personnel Clerk - (D.O.T. 209.362-026) Compiles and keeps personnel records. Does office duties involving personnel records such as filing, typing wage scales, absences, promotions, training statuses, and discharges.

Accident Report Clerk - (D.O.T. 209.362-026) - Prepares and files reports of accidents and injuries at industrial establishment. May perform similar job duties as personnel clerk.

Employment Manager - (D.O.T. 166.167-030) - Organizes, directs, and coordinates personnel relations of organizations.

Job Analyst (personnel analyst) (D.O.T. 166.267-018) - Collects, analyzes, and develops occupational data concerning jobs and job qualifications.

Position Classifier - (D.O.T. 166.267-018) - Analyzes and classifies positions according to regulated guidelines such as level of difficulty and responsibility.

Counselor (Vocational) - (D.O.T. 045.107-010) - Instructs and advises job seekers in field of employment best suited. Evaluates personality, education, and experience. May be in-house person or consultant for organization. (Also See Public Service cluster)

OFFICE (CLERICAL)

Clerk, General Office - (D.O.T. 219.362-010) - Compiles and maintains records of business transactions and office activities of establishment, performs a variety of clerical duties and utilizes knowledge of systems and procedures.

Clerk, General - (D.O.T. 209.562-010) Performs clerical duties not requiring knowledge of systems or procedures. Writes or types bills. Proofreads records or forms. Addresses envelopes or packages by hand or with typewriter. Stamps, sorts, and distributes mail. Operates office duplicating equipment.

Clerk-Typist - (D.O.T. 203.362-010) Performs general office clerical duties requiring use of typewriter.

File Clerk - (D.O.T. 206.362-010) - Files correspondence, reads incoming material, and sorts according to file system. Locates and removes material from files when requested. Keeps control record of filing material.

Tax Clerk - (D.O.T. 219.487-010) Computes state or federal taxes on sales transactions, production processes, or articles produced. Keeps records of amount due and paid.

Mail Clerk - (D.O.T. 209.587-026) - Sorts incoming mail for distribution. Dispatches outgoing mail for delivery.

Router - (D.O.T. 222.587-038) - Stamps, stencils, letters, or tags packages, boxes, or lots of merchandise to indicate delivery date. Determines routes by using standard charts.

Shipping and Receiving Clerk - (D.O.T. 222.387-050) - Verifies and keeps records on incoming and outgoing shipments and prepares items for shipment.

Order Clerk - (D.O.T. 249.367-054) Processes orders for material or merchandise received by mail, telephone, or personal customer or company.

Duplicating Machine Operator - (D.O.T. 207.682-014) - Operates duplicating machine to print typewritten or handwritten matter directly from master copy.

Transcribing Machine Operator - (D.O.T. 203.582-058) - Transcribes letters, reports, and other recorded data. Uses transcribing machine and typewriter.

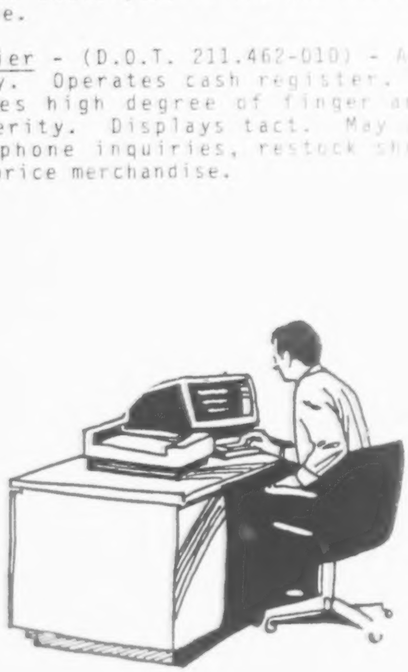
Receptionist - (D.O.T. 237.367-038) Receives clients or customers coming into establishment. Ascertains their wants and directs them accordingly. Makes appointments.

Messenger - (D.O.T. 230-667-010) - Delivers messages, documents, packages, and other items to offices or departments within establishment or to other business concerns.

Timekeeper - (D.O.T. 215.367-022) - Keeps daily record of arrival and departure time of employees. May locate workers on job at various times. May pay employees. Calculates time worked, wages, and units produced.

Typist - (D.O.T. 203.582-066) - Does copy work from rough draft to typewritten material. Majority of duties require use of typewriter. This is one of the basic jobs in the job family are office.

Cashier - (D.O.T. 211.462-010) - Accepts money. Operates cash register. Processes high degree of finger and eye dexterity. Displays tact. May answer telephone inquiries, restock shelves, and price merchandise.



OCCUPATIONAL FAMILIES WITHIN BUSINESS & OFFICE CLUSTER

Accounting

Computer

Secretarial Science

Management

Personnel

Finance–Insurance–Real Estate

Office Clerical

QUALIFICATIONS FOR OFFICE EMPLOYEES

- A good understanding of the English language
- A knowledge of correct grammar and punctuation usage
- The ability to spell words correctly
- The ability to do basic arithmetic
- The ability to produce work quickly and accurately
- Legible handwriting
- The ability to use reference books
- Human relations

BUSINESS ETHICS

75.89(a)(1)(a) OFFICE EDUCATION ESSENTIAL ELEMENT

Identify and practice ethical business procedures

BUSINESS ETHICS

UNIT OBJECTIVE

The student will be able to identify and practice ethical business procedures.

SPECIFIC OBJECTIVES

1. Identify reasons why ethical business procedures are important.
2. Identify three traits necessary for portraying ethical business procedures.
3. Identify characteristics of loyalty, dependability, and honesty as they apply to business ethics.
4. Give examples of loyalty, dependability, and honesty in a business situation.

TEACHER ACTIVITIES

1. Preview the unit.
2. Discuss the unit objectives with students.
3. Discuss the unit overview with students.
4. Assign activities to reinforce information studied.
5. Gather case situations to use in solving problems with ethical business situations.

STUDENT ACTIVITIES

1. Read the unit objectives and unit overview.
2. Identify three traits necessary to practice effectively ethical business procedures.
3. Complete activities concerning information studied.
4. Discuss simulated case situations and explore possibilities in solving problems of business ethics

EVALUATION-Unit test

ESTIMATED COMPLETION TIME 1-2 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

BUSINESS DYNAMICS
text, student activities manual
Bobbs-Merrill Educational Publishers

DRESS RIGHT FOR BUSINESS
text-workbook
Gregg/McGraw-Hill Publishing Co.

EXPECTATIONS ON THE JOB
disk, text
Apple II, IIe, IIc; TRS-80 Model III or 4; IBM PC

MAKING DECISIONS WORK
McGraw-Hill, Inc.

METHODS AND MATERIALS FOR MAKING OCCUPATIONAL SURVIVAL SKILLS
Department of Vocational and Technical Education
University of Illinois

SUCCEEDING IN THE WORLD OF WORK
McKnight & McKnight Publishing Co.

75.89(a)(1)(A)

OBJECTIVE: The student will be able to identify and practice ethical business procedures.

	MASTERY	NON MASTERY
1. Identify reasons why ethical business procedures are important.		
2. Identify three traits necessary for portraying ethical business procedures.		
3. Identify characteristics of loyalty, dependability, and honesty as they apply to business ethics.		
4. Give examples of loyalty, dependability, and honesty in a business situation.		

PERFORMANCE CHART

I. OBJECTIVE SHEET

A. Discuss the unit objective with the students.

B. Discuss each specific objective with the students.

C. Have the students complete the objectives in a sequence best suited to your classroom.

D. Add any objectives necessary to meet fully the needs of the unit and the students.

II. UNIT OVERVIEW

A. Characteristics of ethical business procedures

1. Ask students to give their definition of loyalty.
2. List some of the things or people to whom the students have been loyal in the past.
3. Discuss why they were loyal to these particular things or people.
4. Have the students name some reasons why it is important to be dependable.
5. Let the students relate some experiences when being dependable was important.
6. Talk about the many definitions of honesty and explain how all aspects are related.
7. Explain to students that people develop hard-to-break habits of loyalty, dependability, and honesty.
8. Relate these qualities to job situations and how a worker shows these qualities.

B. Handling responsibility

1. Explain to the students that making excuses is the most common way of avoiding responsibility.
2. Emphasize how people get into the habit of making excuses.

   (NOTE: Talking about habits can make the students realize their own good and bad habits of handling responsibility.)
3. Have the students give some examples of times when excuses have caught up with someone.
4. If available, read some case situations to the students showing negative results of making excuses. Have the students comment on the case situations.
5. Have the students name some of the benefits they might receive from handling responsiblity.

I. LOYALTY IS SHOWN BY:

A. Standing up for friends and the employer

B. Working hard at your job to keep the standards high

C. Not talking unfavorably about the company or job to others

II. DEPENDABILITY IS ACHIEVED BY:

A. Getting to work on time

B. Calling in when you will miss work

C. Doing what you say you will

D. Finishing work on time

III. HONESTY IS DISPLAYED BY:

A. Telling the truth

B. Expressing your feelings on a subject and standing by your convictions

C. Admitting your mistakes

D. Being trustworthy

E. Giving an honest day's work

IV. ADVANTAGES OF HANDLING RESPONSIBILITY

A. Pay raises and promotions are more likely to happen when the individual shows an ability to handle responsibility.

B. Relationships with fellow workers are better.

C. Self-confidence is built.

D. A feeling of satisfaction with oneself occurs.

V. WAYS AN INDIVIDUAL OFTEN AVOIDS RESPONSIBILITY

A. Making excuses

1. Bosses do not want an excuse; they just want the work finished.

2. Continuously making excuses can cause the employer to pass a person by when a better job comes open.

3. Co-workers quickly point out individuals who make excuses rather than do their part.

4. Making excuses can quickly become a habit.

5. Individuals who complete their work and do their part will never have to make an excuse why something is not finished.

B. Avoiding the boss

1. Employees often avoid the boss so they will not be asked to carry out a responsibility.

2. Meet new responsibilities head-on by asking questions and doing one's best.

3. Look forward to the boss' assigning new responsibilities because, if they are done well, it may mean a raise or promotion.

C. Making little effort to do a good job

1. Some individuals will not make their best effort in carrying out a responsibility in hope that the supervisor will not assign it again.

2. More often when a person quickly carries out a responsiblity, even though it may not be a pleasant one, the boss will assign the individual to more important and pleasing responsibilities.

VI. UNDERSTAND JOB RESPONSIBILITIES

A. Know the name and job description of the job you are doing.

(NOTE: Many times workers are not sure what their particular job is called and what they are supposed to do. This can lead to confusion instead of a successful job.)

B. Ask questions if certain procedures are not clear.

C. Do not use a trial-and-error process to discover your job responsibilities.

D. Ask for a formal job description from the supervisor.

E. If there is no formal job description, it is good to write one for your own use.

VII. ADJUSTMENT TO JOB RESPONSIBILITIES

A. Be flexible.

(NOTE: Many times job responsibilities will change from day to day. Be able to change with the demand.)

B. Be sure you understand new job responsibilities.

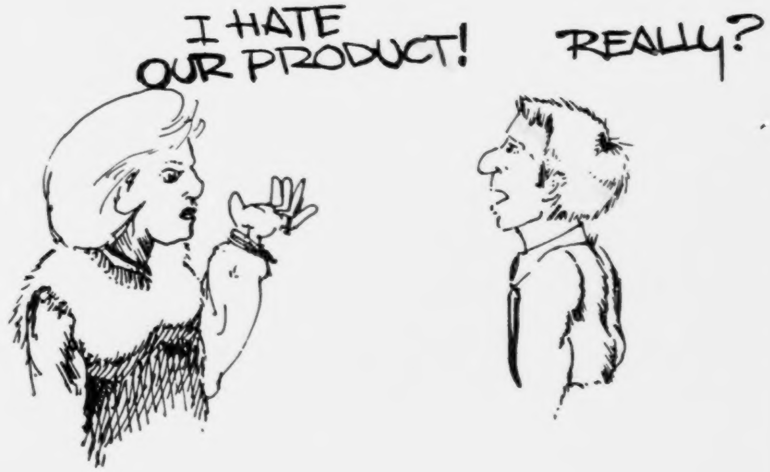
(NOTE: Instructions are not always clear and must be repeated.)

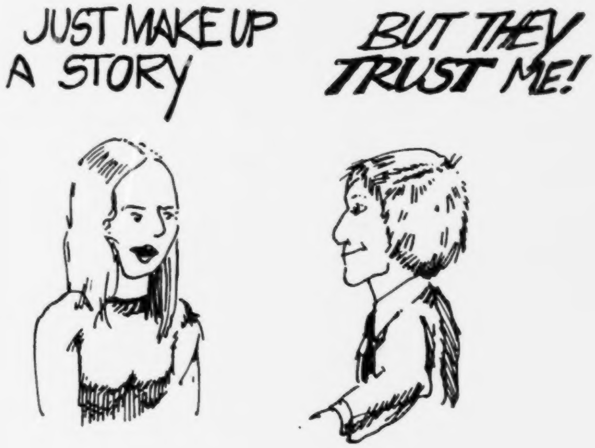
C. Ask co-workers about new responsibilities.

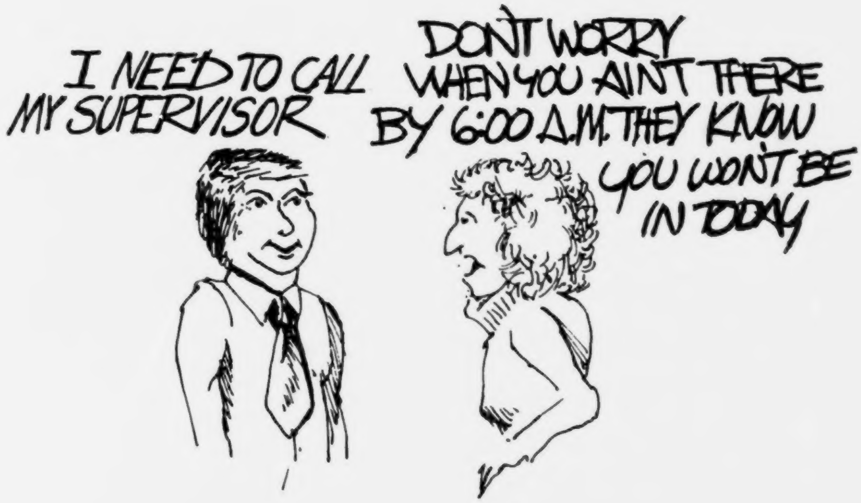
D. Be sure responsibilities can be carried out.

1. Workers may receive conflicting instructions.
2. Workers may receive instructions they are unable to carry out.

CHARACTERISTICS OF A RESPONSIBLE PERSON


I HATE OUR PRODUCT!
REALLY?


JUST MAKE UP A STORY
BUT THEY TRUST ME!


I NEED TO CALL MY SUPERVISOR
DON'T WORRY WHEN YOU AINT THERE BY 6:00 A.M. THEY KNOW YOU WON'T BE IN TODAY

TYPICAL EXCUSES

EVER USE ONE OF THESE?

If I had one more chance.

"THEY" DON'T LIKE ME.

"THEY" DON'T UNDERSTAND.

"If they" would leave me alone.

I HAVE A LOT OF PROBLEMS.

"NO ONE" EVER GIVES ME ENOUGH TIME.

I JUST DON'T LIKE THAT KIND OF WORK.

I didn't feel good.

HUMAN RELATIONS

75.89(a)(1)(c) OFFICE EDUCATION ESSENTIAL ELEMENT

Apply the basic concepts of human relations in all types of interpersonal relationships

HUMAN RELATIONS

UNIT OBJECTIVE

The student will be able to identify the basic concepts of human relations in all types of interpersonal relationships. This knowledge will be evidenced through demonstration and by successfully completing the unit test.

SPECIFIC OBJECTIVES

1. Define terms associated with human relations.
2. Identify skills needed for positive human relations.
3. Identify ways to establish and maintain positive employer-employee relationships.
4. Identify ways to encourage positive co-worker relationships.

TEACHER ACTIVITIES

1. Gather resources to supplement this unit. Be creative!
2. Arrange for a school counselor to speak to the class on human relations.
3. Design a bulletin board illustrating human relations necessary in office careers.
4. Discuss objectives of the unit.
5. Plan activities to stimulate group discussion.

STUDENT ACTIVITIES

1. Identify skills needed for positive human relations.
2. Divide into groups and demonstrate positive human relations in group activities.
3. Role-play human relations situations that can occur in an office.

EVALUATION -Unit Test

ESTIMATED COMPLETION TIME - 5-10 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

COMMUNICATING AT WORK
Text-workbook
South-Western Publishing Co.

COMMUNICATION IN ACTION
Text-workbook
South-Western Publishing Co.

COURTESY UNDER PRESSURE
Six modules, each containing one 16mm
film and facilitator's guide
South-Western Publishing Co.

ENTERING THE WORLD OF WORK
McKnight Publishing Co.

EXPLORING HUMAN RELATIONS
Text-workbook
Houghton-Mifflin Publishing Co.

HUMAN RELATIONS FOR BUSINESS
Text-workbook
South-Western Publishing Co.

HUMAN RELATIONS IN BUSINESS
South-Western Publishing Co.

HUMAN RELATIONS FOR SUCCESS IN BUSINESS
Milady Publishing Co.

PERSONALITY DEVELOPMENT FOR WORK
Textbook
South-Western Publishing Co.

PSYCHOLOGY: HUMAN RELATIONS AND MOTIVATION, 5th ed.
Gregg Division/McGraw-Hill Book Co.

SUCCEEDING IN THE WORLD OF WORK
McKnight Publishing Co.

TODAY'S WOMAN
McGraw-Hill Book Co.

THE LISTENING INVENTORY
1 disK with back-up, documentation
Apple II, IIe or IIc
Career Aids, Inc.

PERSON TO PERSON: LEARNING TO COMMUNICATE
Filmstrips, cassettes, teacher's guide
Career Aids, Inc.

75.89(a)(1)(C)

OBJECTIVE: The student will be able to identify the basic concepts of human relations in all types of interpersonal relationships. This knowledge will be evidenced through demonstration and by successfully completing the unit test.

	MASTERY	NON MASTERY
1. Define terms associated with human relations.		
2. Identify skills needed for positive human relations.		
3. Identify ways to establish and maintain positive employer-employee relationships.		
4. Identify ways to encourage positive co-worker relationships.		

PERFORMANCE CHART

I. PREPARATION FOR UNIT

A. Preview unit and gather any additional resources and references to supplement unit.

B. Arrange for a school counselor, vocational counselor, or counselor from a community agency to speak to the class about human relations.

C. Design a bulletin board illustrating human relations on the job and in other relationships.

II. UNIT OUTLINE

A. Discuss the unit and specific objectives.

B. Add any objectives for any information added to the unit.

III. UNIT OVERVIEW & ACTIVITIES

A. Discuss the information presented, giving examples to illustrate the discussion.

B. Have students complete activities.

1. Activities should be designed to aid the student in self-awareness.
2. Include a class participation activity.

IV. UNIT TEST

A. Give the test upon completion of the unit and activities.

B. Add test parts to correspond to any information added to unit.

V. RESOURCES

I. TERMS AND DEFINITIONS

A. Communication--the exchange of an idea or a message which results in a high amount of understanding between the sender and the receiver

B. Empathy--the ability to see and feel things from another person's point of view

C. Human relations--refers to the relationships between people

D. Human relations skills--skills that help you have positive relationships

E. Initiative--being a self-starter; seeing work that needs to be done, and doing it without waiting to be told to do so

F. Positive human relations--the ability to get along with many different people under varying circumstances

G. Self-awareness--how well you know yourself

H. Self-image--how you feel about yourself

I. Tact--a sense of knowing what to do or say in order to maintain good relations with others and to avoid offense

J. Tolerance--the ability to endure irritations, habits, or mannerisms that may bother you

K. Values--your personal beliefs as to what is good or bad, right or wrong

II. IMPORTANCE OF POSITIVE HUMAN RELATIONS

A. Most of a person's time is spent with other people.

B. This time is happier and more productive if relationships are well adjusted.

C. Approximately 81 percent of all jobs are lost because of the inability to get along with other people.

III. HUMAN RELATIONS SKILLS

A. Self-awareness

The first step to understanding and accepting other people is to know and accept yourself. The following items can help you discover more about yourself.

1. Values
    a. What is important to you
    b. What is right or wrong
    c. What is good or bad
2. Strengths and weaknesses
    a. What are your good and bad points?
    b. What skills do you have?
    c. What personal traits are likeable and which need improvement?
3. Self-image
    a. How you may feel differently about yourself at times, depending on the situation
    b. How your self-image is greatly influenced by how other people react toward you

B. Communication

The two basic forms of communication--verbal and nonverbal--are used to convey the message from sender to receiver.

1. Verbal communication
    a. The words used in speaking and writing.
    b. Choice of words is important for precise meaning.
2. Nonverbal communication
    a. Physical gestures, facial expressions, tone of voice are forms of nonverbal communication.
    b. They help emphasize or describe the message being communicated.
    c. Feelings most often are effectively communicated nonverbally.

C. Empathy

1. Listen to what the other person is saying.
2. Try to put yourself in his/her place to see his-her point of view.

IV. APPLYING HUMAN RELATIONS SKILLS ON THE JOB

A. Employees who work well with their employer and co-workers are happier and more productive.

B. Co-workers are not always those with whom you would choose to be friends.

   1. Their values may differ from yours.

   2. You may not like their lifestyle or personality.

C. It is important to cooperate with co-workers. Team efforts are essential.

D. Respect another person's right to be different.

E. Human relations skills are helpful when unusual circumstances (absentees, rush orders, for example) put excess demands on employees.

   1. Be willing to perform extra duties when necessary.

   2. Show initiative. Start work assignments you know must be done without waiting to be instructed to do so. Keep busy.

F. A positive attitude is "catching." It encourages the same in others.

V. ESTABLISHING SATISFACTORY EMPLOYER-EMPLOYEE RELATIONSHIPS

A. Remember that employers are people, too. Just like you, they:

   1. Have interests outside of work

   2. Have good days and bad days

   3. Like to receive compliments

   4. Sometimes have difficulty accepting criticism

B. Respect, don't fear, your supervisor. (Remember that the supervisor probably held a lesser position before becoming a supervisor.)

C. Suggestions a worker can use in learning to get along with a supervisor:

   1. Be responsible, dependable.

      a. Get to work on time, and work up until quitting time.

      b. Always notify the employer if late arrival or absence is necessary.

      c. Work consistently.

         (1) Take breaks only at designated times.

         (2) Avoid wasting time in excess talk.

         (3) Limit personal telephone calls.

   2. Show interest in the job.

      a. Learn about the company, its policies, administration, products, etc.

      b. Be conscientious of your work. Be neat, thorough, and accurate.

      c. Follow instructions carefully and ask questions if you do not understand.

      d. Be flexible; schedule and work requirements sometimes change unavoidably.

   3. Develop confidence in personal ability.

      a. Polish skills.

      b. Take advantage of opportunities to expand your knowledge by enrolling in college classes or by reading and researching on your own.

      c. Accept and use constructive criticism as a tool for improvement.

      d. Maintain a positive attitude about the job and the employer.

   4. Be honest:

      a. With yourself about your capabilities, your motives, your doubts.

      b. With the supervisor and co-workers.

      c. Don't do something dishonest that could get your supervisor, or yourself, in trouble.

   5. Be straightforward.

      a. Discuss concerns, complaints, and suggestions with the supervisor.

      b. Go directly to your supervisor with a complaint, not to his/her supervisor.

      c. Be loyal to the supervisor and the employing company.

VI. ESTABLISHING POSITIVE RELATIONSHIPS WITH CO-WORKERS

A. Cooperation, consideration, and tact are necessary in working with others.

B. Suggestions for developing positive relationships with co-workers:

   1. Know what duties are expected of you and fulfill them.

   2. Be willing to help others when extra help is needed.

   3. Don't play favorites; respect all co-workers as individuals.

   4. Dress and behave in a manner consistent with the accepted office environment.

   5. Learn and abide by the office rules and any special privileges allowed to certain individuals (Sara leaves at 4:30 to take the mail; John always sits in the green chair at breaks; lunch break is always 12:00-1:00.)

   6. Avoid gossip.

VII. HUMAN RELATIONS WITH CUSTOMERS

A. Customers are the most important element of a business because they are the ones that contribute to profits.

B. Guidelines for dealing with any type of customer

   1. Determine the customer's need.

      a. Each customer is different and has various needs.

      b. Do not make assumptions about people.

      c. Be sensitive to the customer's needs.

   2. Try to satisfy the customer's need.

      a. Have a thorough knowledge of the goods and/or services that the business provides.

      b. Try to match the customer's need with the product or service.

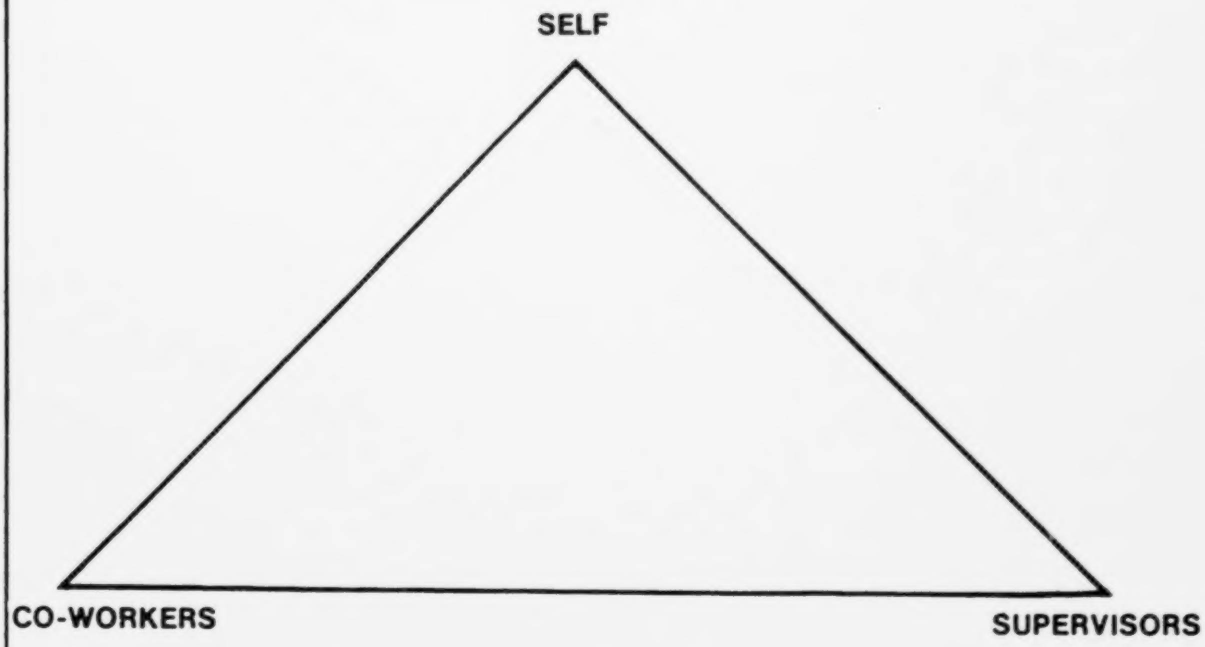
C. Dealing with angry or unsatisfied customers

   1. Never argue with a customer.

   2. Always consider the customer's point of view.

   3. When an angry customer feels that you understand and care about his/her feelings, the customer will usually calm down and deal with the problem in a reasonable manner.

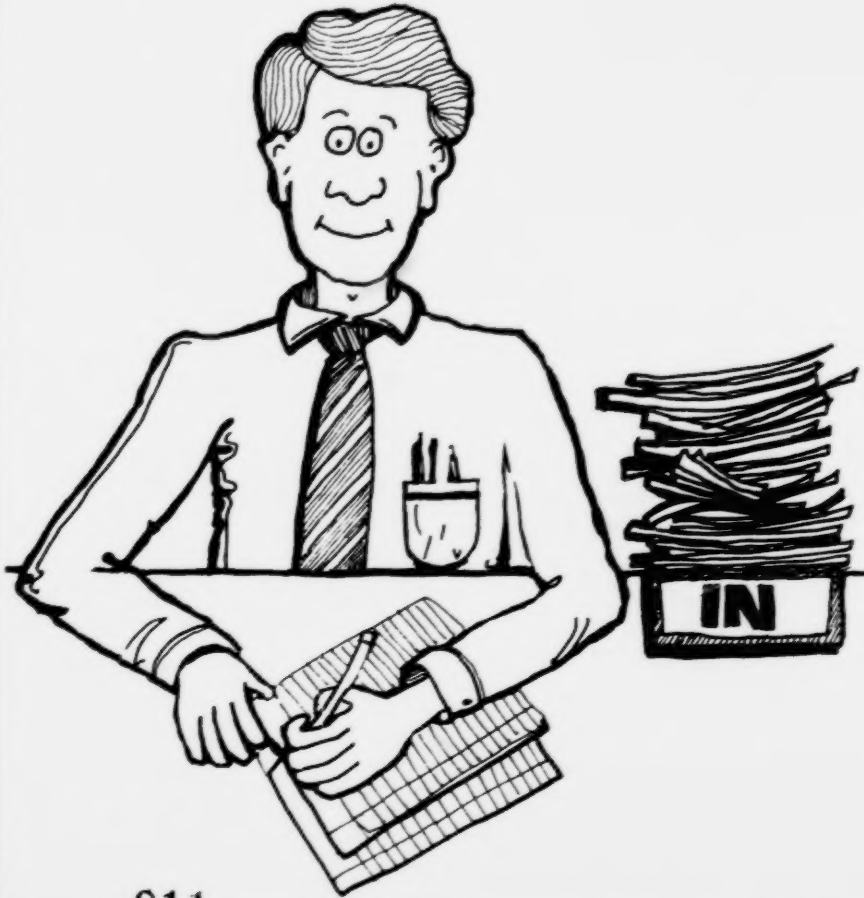
RELATIONSHIPS WITH OTHERS


SELF
CO-WORKERS
SUPERVISORS

Human relations refer to relationships with others. The relationships can be formal or informal, close or distant, emotional or unemotional. AS an employee, you will have a relationship with co-workers and supervisors.

ATTITUDES

Positive Attitude



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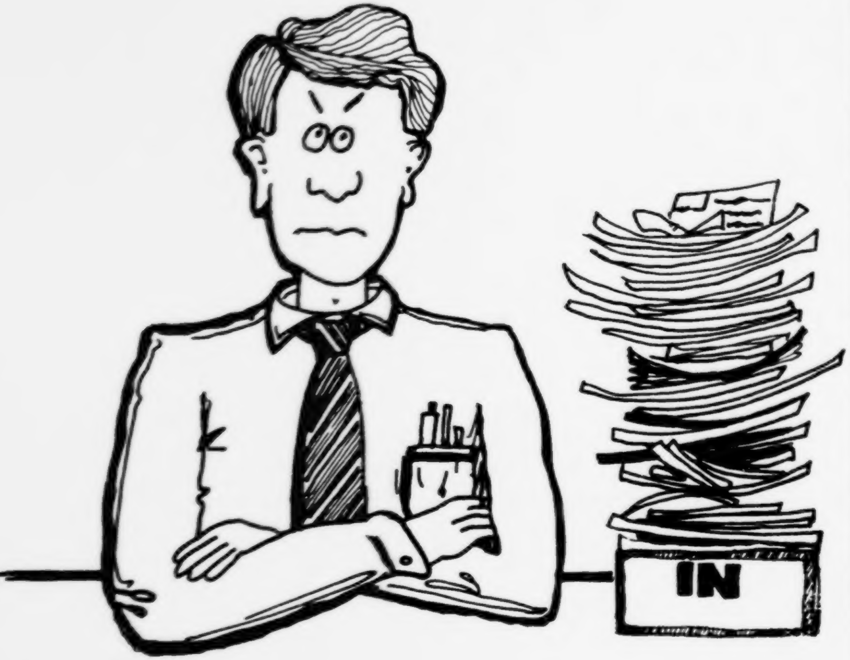
Negative Attitude



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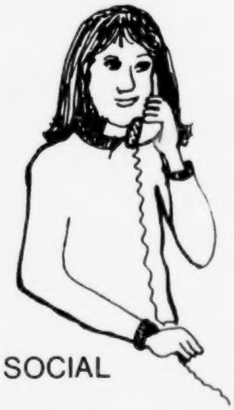
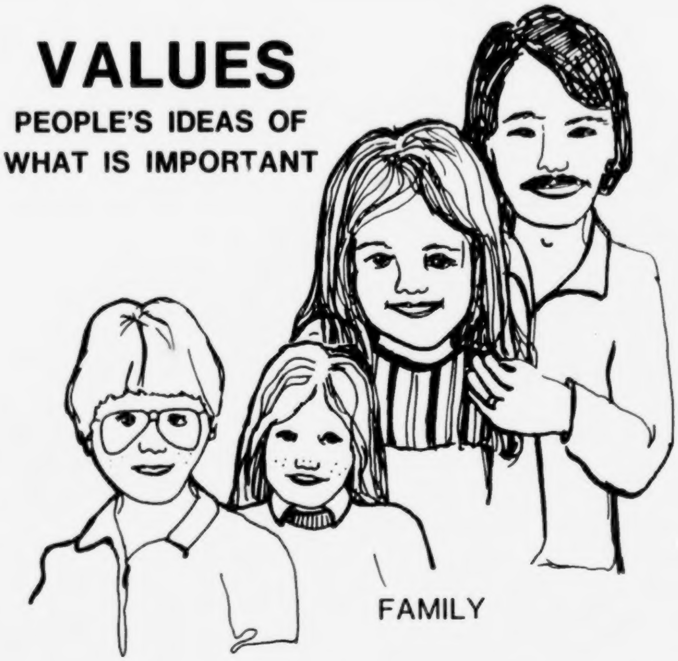
VALUES

PEOPLE'S IDEAS OF WHAT IS IMPORTANT


SOCIAL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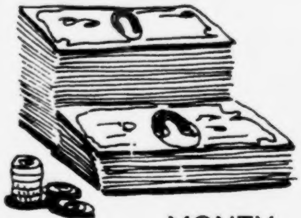
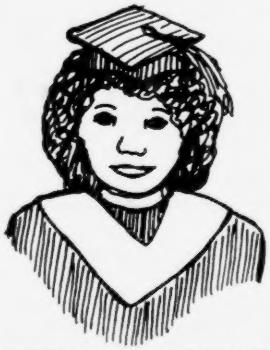
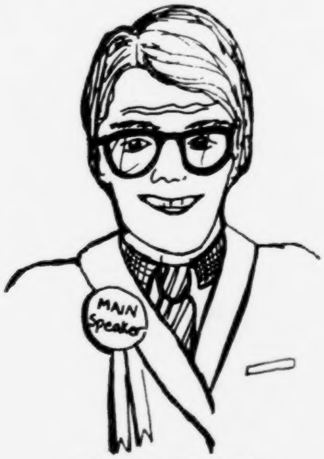
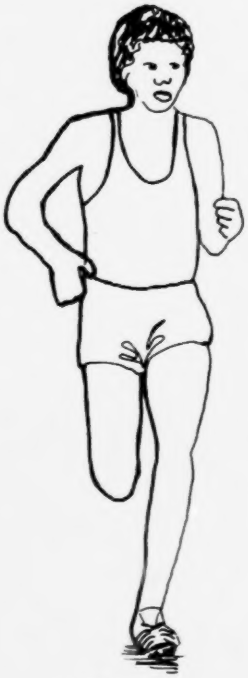
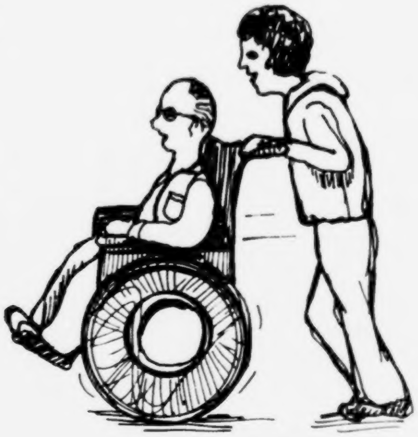

MONEY

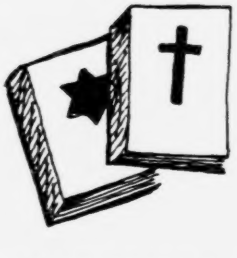

PERSONAL GROWTH



FAME/POWER


HEALTH


HUMANISM


RELIGION/MORALITY

PERSONAL DEVELOPMENT

75.89(a)(1)(d) OFFICE EDUCATION ESSENTIAL ELEMENT

Identify components of personal development as they relate to career plans

PERSONAL DEVELOPMENT

UNIT OBJECTIVE

The student will be able to identify components of personal development as it relates to career plans. This knowledge will be evidenced through demonstration and by successfully completing the unit test.

SPECIFIC OBJECTIVES

1. Discuss self-knowledge and personal development in the context of present career goals.
2. Discuss the role of self-knowledge and personal development in reassessing and developing new goals.
3. List a plan for using self-knowledge in career goal planning.

TEACHER ACTIVITIES

1. Preview the unit.
2. Determine activities to be used.
3. Ask a guest speaker to speak, stressing the importance of self-knowledge in career planning.
4. Secure transparencies, slides, or filmstrips to emphasize the importance of personal development.
5. Emphasize the unique personal nature of the application of this information. Each student will uncover different insights.
6. Assign a report on a chapter from some personality development book. Ask students to give their reports orally.

STUDENT ACTIVITIES

1. Identify the following to be considered in personal development:
    a. personal needs
    b. values
    c. interests
    d. aptitudes
    e. abilities
2. Demonstrate knowledge of ways to enhance personal development through assigned activities for unit.
3. Prepare a report on personality development.
4. Give this report orally to the class.

EVALUATION -Unit Test

ESTIMATED COMPLETION TIME

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. A combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the Resources Section

RESOURCES

CHOICE OR CHANGE: A GUIDE TO CAREER PLANNING
Gregg/McGraw Hill

HUMAN RELATIONS IN BUSINESS
South-Western Publishing Co.

JOB SEEKING GUIDE
Delmar Publishers

MAKING A LIFE . . . MAKING A LIVING: A SELF-APPRAISAL WORKBOOK
The Center for Career and Life Planning

OCCUPATIONAL INVESTIGATION GUIDES: SELF-APPRAISAL
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

PERSONAL HYGIENE FOR BUSINESS
filmstrips/slides, instructor's guide
Milady Publishing Company

PERSONALITY DEVELOPMENT FOR BUSINESS
South-Western Publishing Co.

PERSONAL DYNAMICS IN PERSONALITY DEVELOPMENT
Ohio State University
Columbus, Ohio 43210-1302

PERSONAL HABITS FOR JOB-SUCCESS
1 disk with backup, instruction guide
Apple II, IIe, or IIc
Career Aids, Inc.

75.89 (a)(1)(D)

OBJECTIVE: The student will be able to identify components of personal development as it relates to career plans.

	MASTERY	NON MASTERY
1. Discuss self-knowledge and personal development in the context of present career goals.		
2. Discuss the role of self-knowledge and personal development in reassessing and developing new goals.		
3. List a plan for using self-knowledge in career goal planning.		

I. PREPARATION FOR UNIT

A. Preview the unit.

B. Determine activities to be used and provide any cards, etc. required by the activity.

C. Ask the school counselor to speak to the students on services available through the counselor which would aid in personal development.

D. Ask an employer or personnel consultant to speak to the students to stress the importance of self-knowledge in career planning.

II. UNIT OUTLINE

A. Discuss the unit and specific objectives.

B. Add objectives if necessary to meet the particular needs of your students.

III. UNIT OVERVIEW

A. Discuss the information presented.

B. Add information to correspond to any objectives added to the unit.

C. Use the transparency masters provided to illustrate the following parts.

1. Part II--TM-1--PRIORITY OF NEEDS
2. Part III--TM-2--VALUES
3. Part V--TM-3--EXAMPLES OF APTITUDES
4. Part VII--TM-4--GOALS
5. Part VIII--TM-5--MY RESOURCES ARE?

D. Emphasize the unique personal nature of the application of this information. Each student will uncover different insights.

E. Present information as a whole, or divide into sections if more appropriate.

IV. ACTIVITY SHEETS

A. Activities should be selected to reinforce and personalize the concepts presented in the unit overview.

B. Encourage students to be honest with themselves as they undertake the activities. The value of the activities is in what students learn about themselves that they can use in life.

C. Activities may be assigned in conjunction with the information or they may be assigned after the entire unit has been presented.

V. UNIT TEST

A. The test is designed to cover the concepts presented in the unit.

B. Various approaches may be used in testing.

1. Give the entire test upon completion of the unit.
2. Give parts of the test in conjunction with parts of the unit.
3. Use the test as an activity.

KNOWLEDGE OF YOURSELF IS THE KEY TO YOUR PERSONAL DEVELOPMENT

I. You must know who you are before you can decide in what direction you would like to develop.

II. Knowing yourself gives you confidence.

  A. You gain insight that will help you control your behavior.

  B. You can accept all parts of yourself as unique and can understand and accept others.

III. The person you think you are is often quite different from the true self seen by others. Although you probably feel that you do know yourself, when you begin to get in touch with your true inner self, you are often surprised.

  A. Many of your thoughts, feelings, attitudes are those which you project because you feel they are expected.

  B. Sometimes your true thoughts or feelings have become hidden, even from yourself, because you have spent a lifetime doing what is expected of you.

RECOGNIZING NEEDS IS A GOOD WAY TO BEGIN KNOWING YOUR TRUE SELF

I. One of the "experts" on understanding self, Dr. Abraham Maslow, believes that every individual has certain needs that are to be fulfilled; and the most basic need must be satisfied before the others can become important to the person.

II. Using Maslow's concept, you can understand your needs by dividing them into five kinds or groups.

  A. Physical needs--food, water, rest, health

  B. Safety needs--freedom from danger and fear

  C. Social needs--being with others like ourselves

  D. Esteem needs--liking yourself and having others like and respect you

  E. Self-fulfillment needs--being everything that you can be with what you have and are.

III. The five groups form a pyramid (physical needs at the base) and the lowest unmet need must be met before the needs above it can receive attention.

UNDERSTANDING VALUES IS ANOTHER WAY TO GET TO KNOW THE TRUE YOU

I. Values are personal ideas or feelings that you have about what is important, desirable, and worthwhile in your life.

II. Since each person is unique, it follows that each person has a unique set of values which operate together.

III. Values influence almost everything we do.

IV. Values are shown through the choices you make and the actions you take.

V. Common influences which have helped determine which values you consider important are:

  A. Your family

  B. Close friends

  C. Groups to which you belong

  D. Media

  E. Church

  F. School

  G. Community

CAREFULLY EXAMINING YOUR INTERESTS IS ALSO HELPFUL IN GETTING TO KNOW AND UNDERSTAND YOURSELF

I. This can be done by informally thinking about the things you like best and the things you enjoy doing.

  A. What are your hobbies?

  B. What are your favorite subjects in school?

  C. What activities are you involved in outside of school?

II. A formal interest inventory can be taken to show what kinds of work activities interest you. You may want to talk with your school counselor about this.

AN ASSESSMENT OF YOUR APTITUDES AND ABILITIES CAN GIVE YOU VALUABLE INFORMATION ABOUT YOURSELF

I. An aptitude is a natural tendency (a talent) for doing well in some area (for example, physical dexterity or logical reasoning).

II. An ability is a skill which you have taken time to learn and improve.

HOW DOES THIS NEWLY FOUND KNOWLEDGE FIT INTO YOUR OFFICE EDUCATION?

I. Chances are that your goal is to complete your office education and to get a job.

A. What job do you have in mind?

B. After you have graduated from high school and have worked at your first job for a while, what then?

C. Do you have other goals for your life?

D. How did you set your goals?

II. Goals are more likely to be achieved if they are realistic, that is, if they reflect the true you.

A. The true you, as you have learned, is influenced by a very personal set of needs, values, interests, aptitudes, and abilities.

B. Your goals will be more realistic, and you will be more successful in achieving your goals, if you consider your needs, values, interests, aptitudes, and abilities when you establish your goals.

III. Remember, too, the circumstances of your life will change.

A. You can adapt to change better if you understand how the changes affect your needs, values, interests, etc.

B. You will be able to adjust your goals intelligently to fit changes in your life if you are in touch with what is important to you.

WHAT HAPPENS IF THE GOALS WHICH YOU HAVE SET ARE NOT APPROPRIATE FOR THE NEW THINGS YOU HAVE LEARNED ABOUT YOURSELF? OR WHAT HAPPENS IF CHANGED CIRCUMSTANCES IN THE FUTURE RENDER GOALS INAPPROPRIATE?

I. First decide whether there is anything you can do to make the goals and yourself compatible.

A. Would it help to get more education?

B. If you moved to a new location would the goal be reasonable?

C. If more money is needed, can you obtain it?

D. Could you delay another event (marriage, buying a car, taking a vacation) to make the goal realistic?

II. If you decide that there is nothing you can or that you are willing to do to bring the goal within reach, ask yourself these questions:

A. What made the goal inappropriate?

1. Did it fit your needs?

2. Did it fit your values?

3. Did the goal reflect your interests?

4. Did the goal require an aptitude which you do not possess? Or do you possess an aptitude which the goal did not allow you to use?

5. Do you have or could you develop the abilities required by the goal?

TO APPLY KNOWLEDGE OF YOURSELF IN PLANNING AND GOAL SETTING:

I. Examine what you want to accomplish (tentative goal).

A. What does the goal require?

1. In the way of needs

2. In the way of values

3. In interests

4. In aptitude

5. In abilities

B. Does the goal fit the true you?

II. Examine your strong points as related to the goal.

A. List what you know of yourself.

B. Ask family members and trusted friends what they see as your strong points.

III. Examine your weak points.

A. List what you know of yourself.

B. Ask family members and trusted friends to point out areas in which you can improve.

C. Examine the resources you might use to achieve growth.

1. Yourself

a. Motivation

b. Education

c. Desire

2. Family

a. Moral support

b. Economic aid

3. Community

a. Agencies

b. Schools

c. Financial aid

IV. Establish your adjusted goal.

A. Keep in mind your plans for growth.

B. Consider whether you need to set intermediate goals which will lead to your final goal.

V. Establish a plan of action.

A. Capitalize on your strong points.

B. Improve on your weak points, using all available resources.

C. Ensure that each action moves you in the direction of your goal.

GOALS

Short-Term Goals

Very specific short goals covering a time period of a few days to a week

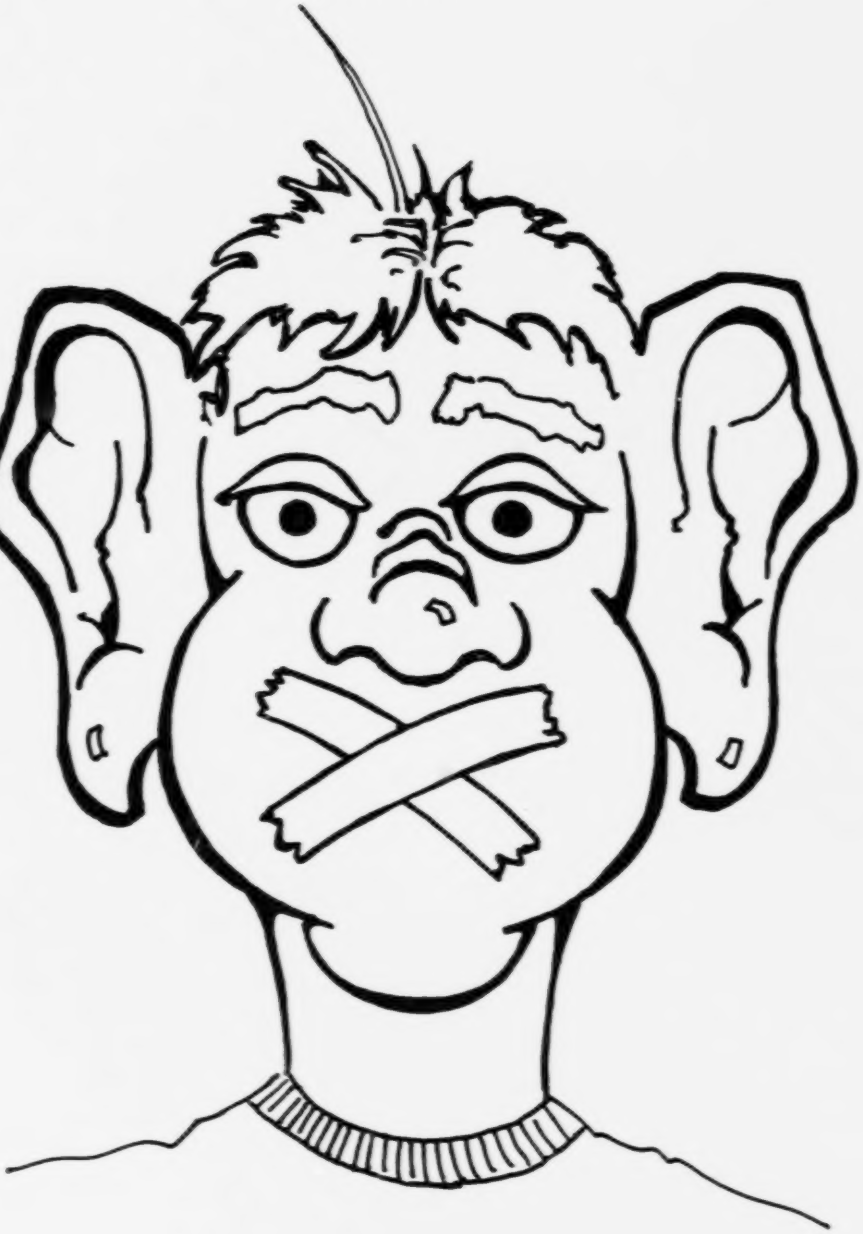
Medium Term Goals

Cover a time period of less than a year and are used to achieve long range goals

Long Term Goals

Very general, flexible goals covering a long period of time — a year or more

TRUST



**TO BUILD TRUST IS TO
LISTEN WITH YOUR EARS
AND KEEP YOUR MOUTH SHUT**

ORGANIZING WORK

75.89(a)(1)(e) OFFICE EDUCATION ESSENTIAL ELEMENT

Prioritize and organize work efficiently

ORGANIZING WORK

UNIT OBJECTIVE

The student will be able to plan and organize work efficiently and prioritize tasks.

SPECIFIC OBJECTIVES

1. Define terms associated with prioritizing and organizing work.
2. Identify the advantages of planning.
3. Identify the disadvantages of working without a plan.
4. Sequence the steps involved in planning and organizing work.
5. Describe types of reminder devices that aid in planning and organizing work.
6. Demonstrate the ability to:
    a. Prioritize tasks according to their importance
    b. Design an efficient work station

TEACHER ACTIVITIES

1. Arrange for a secretary to speak to the class.
2. Arrange a field trip to an office that has been reorganized as the result of a time-and-motion study.
3. Design a bulletin board introducing the unit.
4. Illustrate a variety of reminder devices used in the office.
5. Show slide presentation, Time Management from Occupational Curriculum Laboratory.

STUDENT ACTIVITIES

1. Discuss information from Unit Overview.
2. Participate in a field trip to an office.
3. See slide presentation and complete activities.
4. Design an efficient work station.
5. Complete ACTIVITY SHEET 1--SETTING PRIORITIES from General Clerical Duties and Related Information.
6. Complete ACTIVITY SHEET 2--ORGANIZING THE WORK STATION from General Clerical.

EVALUATION Unit Test

ESTIMATED COMPLETION TIME 1-2 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section

RESOURCES

THE ADMINISTRATIVE SECRETARY: RESOURCE
Gregg/McGraw-Hill Book Company

OFFICE PROCEDURES
Gregg/McGraw-Hill Book Company

SECRETARIAL OFFICE PROCEDURES
South-Western Publishing Co.

SECRETARIAL PROCEDURES AND ADMINISTRATION, 2nd ed.
South-Western Publishing Co.

THE SECRETARY'S WORKSHOP
Bureau of Business Practice, Inc.

75.89(a)(1)(E)

OBJECTIVE: The student will be able to plan and organize work efficiently and prioritize tasks.

	MASTERY	NON MASTERY
1. Define terms associated with prioritizing and organizing work.		
2. Identify the advantages of planning.		
3. Identify the disadvantages of working without a plan.		
4. Sequence the steps involved in planning and organizing work.		
5. Describe types of reminder devices that aid in planning and organizing work.		
6. Demonstrate the ability to:		
a. Prioritize tasks according to their importance		
b. Design an efficient work station		

PERFORMANCE CHART

I. PREPARATION FOR UNIT

A. Preview the unit.

B. Add any information necessary to meet fully the needs of the unit and of the students.

C. Design a bulletin board introducing the unit.

1. Use a "pie" chart which illustrates the percent of time a secretary might spend on various tasks in the office.

2. Illustrate a variety of reminder devices used in the office.

3. Show an efficient layout for an office work area.

D. Arrange for a secretary to speak to the class on ways to save time and energy when doing daily office work.

E. Arrange a field trip to an office that has been reorganized as the result of a time-and-motion study. Ask the secretary or supervisor to discuss with the class the improvements that have occurred because of the new arrangements.

II. TEACHING THE UNIT

A. Discuss the unit and specific objectives.

B. Add objectives for any information added to the unit.

III. UNIT OVERVIEW

A. Terms and definitions

1. Discuss the terms and definitions.

2. Provide any examples or illustrations to facilitate the discussion.

B. Show slide presentation, Time Management, from OCL. Assign activities from student guide.

C. Planning

1. Discuss the advantages of planning and the disadvantages of no planning.

2. Provide examples to facilitate the discussion.

D. Work

1. Discuss the three types of work that exist in an office.

2. Illustrate how the three types of work might flow together in the office setting.

E. Planning and organizing

1. Discuss the steps in planning and organizing work.

2. Provide examples of rush, as-soon-as-possible, and routine work to facilitate the discussion.

F. Time-saving devices

1. Discuss the elements that can influence time-saving and organization.

2. Use the teacher's desk to demonstrate how to arrange a desk top for efficient use.

3. Use the teacher's desk to demonstrate efficient use of drawer space.

4. Discuss how the classroom could be arranged to facilitate time-saving as discussed in this section of the unit.

G. Reminders

1. Discuss the various types of reminder devices that are used in an office.
2. Provide examples of a calendar and a reminder file to facilitate the discussion.
3. Demonstrate the use of each of the reminder devices used as examples.
4. Discuss the use of schedules as they relate to the class as well as to the office.
5. With student input, demonstrate scheduling by planning a daily, weekly, and long-range schedule for classroom activities.

H. Activities from General Clerical Duties and Related Information

1. ACTIVITY SHEET 1--SETTING PRIORITIES
2. ACTIVITY SHEET 2--ORGANIZING THE WORK STATION

I. Unit Test from General Clerical Duties and Related Information

Various methods of administering the test may be used.

1. Administer the test upon completion of the unit.
2. Use the test as an additional activity.

I. TERMS AND DEFINITIONS

A. Organizing--the coordination of activites to meet the completion of predetermined goals

B. Planning--deciding in advance what needs to be done, who will do it, and when it will be done

C. Productivity--the ability to accomplish a task or job accurately and on time

D. Scheduling--listing activites or work to be completed; a timetable

E. Time waster--any task or activity that takes more time than it should for successful completion

II. ADVANTAGES OF PLANNING

A. Eliminates time wasters

B. Increases productivity

C. Makes better use of resources

D. Increases effectiveness in doing work

E. Increases efficiency

F. Eliminates duplication of effort

III. DISADVANTAGES OF NO PLANNING

A. Results in poor quality work

B. Decreases productivity

C. Decreases efficiency

D. Results in misuse of resources

E. Increases time wasters

IV. TYPES OF WORK PERFORMED

A. Daily

1. Performed every day by the secretary without special instructions.

2. May include such duties as filing, processing the mail, answering the telephone, handling office callers, handling orders, etc.

B. Assigned

1. Performed at various times during the week or month

2. Performed at the direction of the employer

3. May include such duties as typing correspondence, composing letters, preparing payroll, handling travel arrangements, arranging meetings, etc.

C. Other

1. Performed on an irregular basis

2. Varies according to the employer and type of business

3. May include such duties as preparing income tax reports, preparing quarterly or yearly reports, etc.

V. STEPS IN PLANNING AND ORGANIZING WORK

A. Set priorities

1. Prepare a schedule of work to be completed that day.

(NOTE: This may be done the day before.)

2. Decide on the order in which the work will be completed.

a. Rush jobs--work that must be completed

b. As-soon-as-possible jobs--important work; does not require immediate action but should be done as soon as time permits

c. Routine jobs--work that is completed when time permits and after other, more important, tasks have been completed.

3. Be flexible; allow for unexpected work.

B. Organize work

1. Plan each job to be completed.

2. Gather materials needed to complete the work.

3. Make notes of any questions to ask or of special instructions needed to complete the work.

C. Complete the work

1. Do one job at a time.

2. Follow one job through to completion before beginning another.

VI. TIME SAVING STEPS

A. Organize work area.

1. Desk

a. Arrange frequently used items on the desk top within easy reach to avoid wasting time.

(1) Telephone and telephone directory

(2) Calendar

(3) Materials being worked on

(4) Pens and pencils

(5) Stapler and tape dispenser

(6) Reference books

(7) Trays for holding work in progress, mail, etc.

(8) Calculator

b. Arrange supplies in desk drawers depending on use.

(1) Top drawer--used to store letterhead paper, carbon paper, onionskin, memo forms, envelopes, plain paper

(2) Center drawer--used to store paper clips, ruler, pens, erasers, staple remover, scissors, rubber bands

(3) File drawer--used to store frequently used files

(4) Other drawers--used to store other miscellaneous supplies and personal items

2. Supply Cabinet

a. Locate near work area.

b. Store extra supplies on shelves.

c. Arrange supplies according to frequency of use. Items used most should be stored at the front of shelves. Heavy items should be stored on lower shelves.

3. File cabinets

a. Maintain an up-to-date filing system.

b. Locate frequently used file cabinets near the work area to save time.

4. Book shelves

a. Locate book shelves near work area to save steps.

b. Store reference books and materials on shelves to keep desk top clear.

B. Use reminder devices

1. Calendar

a. Use to note work that must be completed each month.

b. Use to keep track of daily appointments.

2. Reminder file

a. File cabinet drawer

(1) Use to hold work that is to be completed daily, monthly, or yearly.

(2) Organize by months with folders for each day of the month.

(3) Store material in folders according to the date when action must be taken or begun.

b. Card file

(1) Use to hold reminders of tasks that must be completed on specific days of a given month.

(2) Organize by months, with a card for each day of the current month.

(3) Write reminders on file cards and store behind the guide showing the date on which a specific task must be done.

(4) Remove the reminder card when the task has been completed.

(5) Rotate the guide showing the name of the current month at the beginning of each month.

3. Schedules

a. Daily schedule--a record of daily work to be completed; organized according to the time at which a task is to be done

b. Weekly schedule--a record of any work that is completed once a week or once or twice a month, such as computing payroll, making bank deposits, etc.

c. Long-range schedule--a record of any work that may occur at various times during the year, such as quarterly reports, income tax reports.

C. Eliminate unnecessary motion.

1. Arrange work area to save time and effort.

2. Keep an up-to-date inventory of all supplies.

3. Restock necessary supplies before beginning work.

4. Eliminate steps or tasks which are no longer necessary.

5. Combine tasks that can easily be done at the same time.

6. Redesign forms if necessary to save time.

7. Make use of time-saving equipment, such as office copiers, collators, and paper folders.

8. Complete difficult jobs when you are at your best.

RESOURCES AND REFERENCES

75.89(a)(1)(f) OFFICE EDUCATION ESSENTIAL ELEMENT

Identify and use resources and references available

RESOURCES AND REFERENCES

UNIT OUTLINE

UNIT OBJECTIVE

After completion of this unit, the student will be able to identify and use resources and references available for office workers. This knowledge will be evidenced through demonstration and by successfully completing the unit test.

SPECIFIC OBJECTIVES

1. Identify the two types of sources available.
2. List the reasons for using resources and references.
3. Identify the five types of reference books available for use in an office.
4. Identify the three types of resources available for use by an office worker.
5. Identify references available in the school or local library.
6. Identify resources available in the community.
7. Demonstrate the ability to use
    a. A dictionary
    b. A word book
    c. A reference manual for office workers

TEACHER ACTIVITIES

1. Preview unit using instructional guide, General Clerical Duties and Related Information--OCL.
2. Provide resources and references necessary to supplement the unit.
3. Obtain samples of reference books.
4. Arrange for students to visit the school or local library.
5. Promote class discussions on using resources and references.

STUDENT ACTIVITIES

1. Visit school or local library and discuss available sources of information and use of card catalog with the librarian. Complete ACTIVITY SHEET 1--USING REFERENCES, General Clerical Duties and Related Information, OCL.
2. Complete ACTIVITY SHEET 2--DETERMINING RESOURCES and ACTIVITY SHEET 3--PREPARING A CARD FILE from General Clerical Duties and Related Information-OCL.
3. Use a word book and reference manual to complete ACTIVITY SHEETS 3, 4, and 5 from General Clerical Duties and Related Information, OCL.

EVALUATION -Unit Test

ESTIMATED COMPLETION TIME - 1-2 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section

RESOURCES

APPLIED SECRETARIAL PROCEDURES, 7th ed.
Gregg/McGraw-Hill Book Company

BUSINESS ENGLISH AND COMMUNICATION, 4th ed.
Gregg/McGraw-Hill Book Company

CLERICAL OFFICE PROCEDURES, 6th ed.
South-Western Publishing Company

THE REFERENCE GUIDE, A HANDBOOK FOR OFFICE PERSONNEL
Houghton Mifflin Company

THE SECRETARY, AN INTEGRATED BLOCK PROGRAM, Part 1
Gregg/McGraw-Hill Book Company

SECRETARIAL OFFICE PROCEDURES, 9th ed.
South-Western Publishing Company

SECRETARIAL PROCEDURES AND ADMINISTRATION
South-Western Publishing Company

75.89(a)(1)(F)

OBJECTIVE: After completion of this unit, the student will be able to identify and use resources and references available for office workers. This knowledge will be evidenced through demonstration and by successfully completing the unit test.

	MASTERY	NON MASTERY
1. Identify the two types of sources available.		
2. List the reasons for using resources and references.		
3. Identify the five types of reference books available for use in an office.		
4. Identify the three types of resources available for use by an office worker.		
5. Identify references available in the school or local library.		
6. Identify resources available in the community.		
7. Demonstrate the ability to use:		
a. A dictionary		
b. A word book		
c. A reference manual for office workers		
UNIT TEST		

PERFORMANCE CHART

I. PREPARATION FOR UNIT

A. Preview the unit. Provide any resources and references necessary to supplement the unit.

B. Gather resources available in the classroom to aid in the discussion of the information.

C. Obtain samples of reference books from other sources to aid in discussion.

D. Arrange for the students to visit the school or local library. Have the librarian discuss the available sources of information and use of the card catalog.

(NOTE: Be sure to inform the librarian about the types of references the students will need.)

II. UNIT OUTLINE

A. Discuss the unit and specific objectives.

B. Add objectives for any information added to the unit.

III. UNIT OVERVIEW

A. Discuss the two types of sources available. Explain the differences between the two.

B. Discuss the reasons for using resources and references. Provide examples of why they would need to use resources and references.

C. Discuss the various types of references. Provide examples of the various types of references.

D. Set aside time for the students to visit the library to complete ACTIVITY SHEET 1--USING REFERENCES, General Clerical and Related Information, OCL.

E. Discuss the types of resources available. Explain the types of information or assistance these resources may provide.

F. Have students complete the following:

1. ACTIVITY SHEET 2--DETERMINING RESOURCES, General Clerical Duties and Related Information, OCL.
2. ACTIVITY SHEET 3--PREPARING A CARD FILE, General Clerical Duties and Related Information, OCL.

G. Provide students with a dictionary, a word book, and a reference manual for completing the following activities from General Clerical Duties and Related Information, OCL:

1. ACTIVITY SHEET 4--USING THE DICTIONARY
2. ACTIVITY SHEET 5--USING A WORD BOOK
3. ACTIVITY SHEET 6--USING A REFERENCE MANUAL

IV. ANSWERS TO ACTIVITY SHEETS

A. Answer sheets are provided in General Clerical Duties and Related Information, OCL.

B. Answers to Activity Sheets 1, 2, and 3 will depend upon the resources and references available.

C. Prepare answers for any activites added.

V. UNIT TEST

A. Various approaches may be used in testing.

1. Use the test as an additional activity.
2. Give the test upon completion of the unit and activites.

VI. ANSWERS TO UNIT TEST

I. TYPES OF SOURCES AVAILABLE

Many sources are available for obtaining information or assistance and may be categorized as follows:

A. References are books such as:

  1. Dictionaries
  2. Reference manuals
  3. Directories

B. Resources are people or places who provide information and assistance such as:

  1. Libraries
  2. Organizations
  3. Travel bureaus

II. REASONS FOR USING RESOURCES AND REFERENCES

A. To find information

B. To verify information

C. To clarify information

D. To compile information

III. TYPES OF REFERENCES

Reference books are important to office workers in locating information when it is needed and in performing job duties efficiently and effectively. The types of reference books used by an office worker will depend on the nature of work performed and background information needed. Some of the reference books office workers should have access to are:

A. Reference manuals for office workers

  1. General reference manuals

    a. Provide general information on office procedures and practices

    b. Used as a general reference by all office workers

  2. Specialized reference manuals

    a. Provide specific information on office procedures and practices for specialized fields

    b. Available for office workers in the following areas:

      (1) Legal

      (2) Medical

      (3) Technical

      (4) Word processing

      (5) Accounting

      (6) Engineering, etc.

B. Dictionaries and word books

  1. Desk-size dictionary

    a. Considered the most comprehensive reference manual on language usage

    b. Used most frequently to check spelling, to verify punctuation, and to look up definitions

  2. Word books

    a. A quick source to the correct spelling and syllabication of commonly used words

    b. Used most frequently to verify spelling and division of words

  3. Specialized dictionaries and word books

    a. Deal with the specialized vocabulary used by certain professions (engineering, legal, medical, foreign languages, etc.)

    b. Include the spelling, division, and pronunciation of words

  4. Thesaurus

    a. A collection of words and phrases arranged according to ideas or concepts

    b. Used to find the word or words to express exactly what you mean

C. Directories

  1. Provide alphabetical listings of names and addresses of people in a particular profession, business, or industry in a given geographical area

2. Provide assistance in finding name, address, and telephone number of people or companies
3. Types of directories
    a. Telephone directories
    b. City directories
    c. Government directories
    d. Business and industry directories

D. Encyclopedias

1. Provide information on a wide variety of subjects
2. May provide specific or general information about topics

E. General references

Additional references that provide information essential to an office worker are:

1. National ZIP Code Directory--includes information on how to use the ZIP code, address abbreviations, post office and ZIP codes
2. Postal Manual--includes postal regulations, rates, and services
3. Hotel/Motel Red Book--includes the following information.
    a. Names of hotels and motels by city and state
    b. Location and telephone number
    c. Number of rooms and services provided
    d. Room rates
4. Official Airline Guide--provides a comprehensive listing of all flight information
5. Grammar and style books--used to determine correct grammar and writing style
6. Indexes
    a. Used to locate information on particular subjects
    b. List contents of books and periodicals
7. Almanacs--provide a wide range of information about important events, census information, etc.
8. Atlas--provides geographical and statistical information
9. Trade and professional journals--provide information for a particular trade or profession, such as educational journals, business and office publications
10. Company procedures manual--provides information on rules, regulation, and procedures established for a particular company (travel policies, sick leave policies, etc.)

IV. RESOURCES FOR INFORMATION

In addition to reference books, information or assistance may also be obtained from various resources available at the local, state, and national levels.

A. Local resources

1. Chamber of commerce
2. U. S. Postal Office
3. City and county offices
4. Better Business Bureau
5. Professional and service organizations
6. Library
7. Information and referral agency
8. Other businesses

B. State resources

1. Government agencies
2. Tourist information bureaus
3. Colleges, and universities
4. Professional and service organizations

C. National resources

1. Government agencies
2. Professional and service organizations
3. Other sources

BEST COPY AVAILABLE

BUSINESS FORMS

75.89(a)(1)(g) OFFICE EDUCATION ESSENTIAL ELEMENT

Identify the different types of business forms and reports and procedures for processing them

BUSINESS FORMS

UNIT OBJECTIVE

The student will be able to identify types of business forms and demonstrate procedures for preparing them.

SPECIFIC OBJECTIVES

1. Define terms associated with business forms.
2. List the type of forms prepared in an office.
3. Demonstrate the ability to prepare the following forms:
    a. Personnel forms
    b. Payroll forms
    c. Travel forms
    d. Purchasing forms
    e. Sales forms
    f. Miscellaneous forms

TEACHER ACTIVITIES

1. Obtain samples of forms from local businesses.
2. Design a bulletin board using the sample forms.
3. Discuss the terms and definitions with students.
4. Use transparencies of various forms in class discussion.
5. Instruct students to prepare actual forms from activity sheets, practice sets, or workbooks.

STUDENT ACTIVITIES

1. Discuss the types of forms used in an office.
2. Discuss the use of each type of form.
3. Demonstrate the ability to prepare each type of form correctly.
4. Demonstrate ability to use the microcomputer to prepare and complete business forms.

EVALUATION-Unit Test

ESTIMATED COMPLETION TIME

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

ADMINISTRATIVE PROCEDURES FOR THE ELECTRONIC OFFICE
John Wiley and Sons, Inc.

DAILY BUSINESS COMMUNICATIONS
Films, program guide, and masters
Prentice-Hall Media

OFFICE PROCEDURES
Milady Publishing Co.

PRACTICE SETS FOR BUSINESS: A TYPING SIMULATION
Prentice-Hall Media

THE RESEARCH AND REPORT HANDBOOK FOR BUSINESS, INDUSTRY, AND GOVERNMENT
John Wiley and Sons, Inc.

THE SECRETARY'S WORKSHOP
Bureau of Business Practice

75.89 (a)(1)(G)

OBJECTIVE: The student will be able to identify types of business forms and demonstrate procedures for preparing them.

	MASTERY	NON MASTERY
1. Define terms associated with business forms.		
2. List the types of forms prepared in an office.		
3. Demonstrate the ability to prepare the following forms:		
a. Personnel forms		
b. Payroll forms		
c. Travel forms		
d. Purchasing forms		
e. Sales forms		
f. Miscellaneous forms		

PERFORMANCE CHART

I. GENERAL INFORMATION

A. Most businesses depend on some type of form on which to process data, with the type and size of the business determining to what extent these forms are used. Since each business has its own particular needs and the types and styles of forms are numerous, this unit includes only the basic types. Forms are usually typewritten, but they also may be handwritten and may be used as source documents in the data processing cycle. Each business form should be designed for a specific purpose, asking only for the information needed.

B. Several software packages are available that teach the use of business forms in the office. If microcomputers are available, use one of these packages to reinforce knowledge with hands-on experience in automated form preparation.

II. UNIT PREPARATION

A. Preview the unit

B. Gather resources or references necessary to supplement the unit.

C. Duplicate copies of forms provided with the unit.

III. UNIT OVERVIEW

A. Use the unit overview for discussion of information to be covered.

B. Discuss the specific objectives.

C. Discuss terms and definitions.

D. Discuss the advantages of using forms and the types of forms available for use in an office.

E. Discuss the procedures for using forms in an automated office using microcomputers and word processors.

IV. INSTRUCTIONAL MATERIALS

A. Use Activity Sheets and Transparency Masters from OCL General Clerical Duties if available.

B. Have forms available for discussion and demonstration in the following areas:

1. Personnel forms
2. Travel forms
3. Purchasing forms
4. Sales forms
5. Payroll forms

C. Select materials available from resources list for student practice. Review guidelines from preparing forms.

D. Select and demonstrate microcomputer software using business forms.

V. UNIT TEST

A. Use prepared test over material covered.

B. Prepare test using information corresponding to information discussed and practiced.

I. TERMS AND DEFINITIONS

A. Absence report--used to prepare a summary of absences for each employee during a pay period

B. Credit memo--sent to an individual business notifying the buyer that his/her account has been credited for items returned or for an error in billing

C. Form--a sheet of paper with lines and columns on which information is recorded

D. Health insurance enrollment form--prepared to enroll an employee in the health insurance program provided by the company

E. Insurance claim form--prepared when filing for repayment of expenses incurred by an employee and which are covered by the insurance plan

F. Interdepartmental order--used to request supplies or services within the company

G. Invoice--a bill for merchandise purchased prepared by the seller listing items purchased, quantity purchased, amount of purchase, date of purchases, and name of purchaser; may be sent with or immediately after the order is shipped

H. Packing slip--prepared by the carrier listing the goods being shipped to serve as a receipt for the purchases

I. Personnel action form--completed and submitted to the personnel department when a person is hired, changes status of employment, or is terminated

J. Personnel requisition--completed and submitted to the personnel department when a new position is open or a replacement is required

K. Purchase order--prepared by an individual or purchasing department to order items from suppliers outside the company

L. Purchase requisition--prepared by an individual or office to request the purchase of supplies, materials, books, equipment, etc.; generally prepared before a purchase order is completed

M. Request for check--used to request payment for items ordered by employees

N. Statement of account--a form prepared at the end of a billing period listing transactions charged to a customer's account

O. Time card--prepared for each employee to record the amount of time worked; used for computing payroll checks

P. Travel expense report--an itemized record of expenses incurred on a business trip, such as meals, transportation, lodging; completed in order to receive reimbursement for expenses incurred

Q. Travel request--prepared to incumber money prior to a trip

R. W-4 form--an Employee's Exemption Certificate completed on each employee to indicate marital status and number of exemptions for determining the amount of money to be withheld from the employee's gross pay

II. ADVANTAGES OF USING BUSINESS FORMS

A. Arranges and classifies information for easy reading

B. Saves time and effort in recording information

C. Helps eliminate mistakes when recording information

D. Makes information easy to find

III. TYPES OF FORMS AVAILABLE

Many types of forms are available for purchase by an office to use when preparing forms. Some of the forms available are:

A. Snap-out form--a self-contained, preassembled packet with carbon paper

B. Carbonless form--preassembled packet using carbonless paper which eliminates the use of carbon paper

C. Continuous forms--a set of forms joined together to another to form a continuous packet of forms

D. Spot-carbon-coated forms--no-smudge carbon is applied to certain spots on the back of each form in a pack

IV. TYPES OF FORMS PREPARED

The types of forms prepared in an office will depend on the size of the office and the type of business. Some of the forms commonly prepared in an office are:

A. Personnel forms
   1. Health forms
   2. Personnel action forms
   3. Personnel requisition
   4. Absence reports

B. Travel forms
   1. Travel application
   2. Travel expense report

C. Purchasing forms
   1. Purchase requisitions
   2. Purchase order
   3. Interdepartmental order

D. Sales forms
   1. Invoice
   2. Credit memorandum
   3. Statement of account

E. Payroll forms
   1. Time cards
   2. W-4 forms
   3. Tax forms
   4. Request for checks
   5. Voucher checks
   6. Payroll register

F. Miscellaneous forms
   1. Record of visitors
   2. Telex messages
   3. Mailing orders

V. GUIDELINES FOR PREPARING FORMS

A. General guidelines

   1. Read through the form before typing the information.
   2. Use elite type, if possible, in order to type the information in the spaces provided.
   3. Tabulate and type across the form.
   4. Proofread and make all corrections before removing the form from the typewriter.

B. Specific guidelines

   1. Margins and tabs
      a. Set left margin for typing name and address block.
      b. Set a tab stop for aligning items in the information section to the right of the address block.
      c. Set tab stops for the beginning of each column.
   2. Spacing
      a. Single-space column lines if there are four or more lines or if using a half-size form (8 1/2 x 5 1/2").
      b. Double-space column lines if there are three or fewer lines or if using a full-size form (8 1/2 x 11").
      c. Begin the items in the description column two spaces to the right of the vertical line.
      d. Single-space and indent three spaces if an item requires more than one line.
      e. Position each ruled line so all type appears slightly above the line.
      f. Align the typing line with guide words, leave two spaces, and type the information.

3. Centering
    a. Center type within preprinted boxes.
    b. Center column entries horizontally within the columns.
    c. Align numbers at the right and words at the left.

VI. TYPING ON LINED AND RULED PAPER

A. Using the variable line spacer, position the cylinder at the correct writing space.

B. Place the ruled line where the underscore will strike it. The paper must be straight in the typewriter.

C. The bottom of the lowercase letters "g," "j," "p," "q," and "y" should just touch the ruled line. All other letters should be slightly above the line.

D. The ruled line should be perfectly aligned with the aligning scale on the typewriter.

E. The same procedures used above should be followed to get the correct position of each succeeding line.

F. To obtain the perfect position on the ruled line, practice using the underscore key and type a line across the page. Backspace to the beginning of the line without using the carriage return. Type the entire alphabet in lower case and all the digits from 0 to 9. Notice how the "g," "j," "p," and "y" just touch the line.

VII. TYPING WITHIN RULED COLUMNS

A. Set tab stops and margin stops so that material will be arranged evenly and attractively within the columns.

B. Type across the page, using tab stops, line by line.

VIII. FORMS WITH PRE-PRINTED BOXES

A. Many forms must be completed in a format for data processing.

B. The type should be centered in the box by using the variable line spacer. Sometimes it may be necessary to pull the paper release and slide the paper into the proper position.

IX. FORMS USING GUIDE WORDS AND/OR VERTICAL LINES FOR COLUMNS

A. Guide words are those words used in asking for specific information, such as "Date," "From," and "Sold To."

B. Align the writing line with the guide word. The information typed after the guide word should not be below or above the guide word.

C. Leave two spaces after the guide word and type the information.

D. Type within the vertical lines. Align numbers at the right and words at the left.

E. Use tabular stops, as you would in any tabulation, for the beginning of each column or the longest word or number in each column.

BUSINESS REPORTS

75.89(a)(1)(g) OFFICE EDUCATION ESSENTIAL ELEMENT

Identify the different types of business forms and reports and procedures for processing them

BUSINESS REPORTS

UNIT OBJECTIVE

After completion of this unit, the student will be able to identify the different types of business reports and procedures for preparing business reports. This knowledge will be evidenced through demonstration and by satisfactorily completing the unit test.

SPECIFIC OBJECTIVES

1. Define the purpose of a report.
2. List the four types of business reports.
3. Identify the parts of a memorandum.
4. Identify the information included in the minutes of a meeting.
5. List the characteristics of a formal business report.
6. Identify the parts of a formal business report.
7. Demonstrate the correct procedures for preparing:
    a. memorandum
    b. tables
    c. minutes of a meeting
    d. formal business report

TEACHER ACTIVITIES

1. Preview the unit.
2. Gather resources and references necessary to provide additional information to supplement the unit.
3. Design a bulletin board to introduce the unit.
4. Use the Unit Overview to discuss the unit information with students.
5. Use transparencies to identify types of reports.
6. Introduce the audiovisual aid, "Formatting Business Reports" into the lesson. Use Activity Sheets included with this package.
7. Have students demonstrate knowledge of this unit by preparing reports from materials listed in resource section to reinforce the information studied.

STUDENT ACTIVITIES

1. Discuss objectives and information in Unit Overview.
2. Demonstrate the correct procedure for preparing:
    a. memorandum
    b. tables
    c. minutes of a meeting
    d. formal business report
3. Using OCL Activity Sheets, audiovisual activity sheets, or other resources, prepare correct business reports from rough draft.

EVALUATION-Unit Test

ESTIMATED COMPLETION TIME 2-4 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

THE BUSINESS REPORT SERIES
Educulture Inc.

MANUSCRIPT/REPORT FORM POSTERS AND TRANSPARENCIES
Milady Publishing Co.

OFFICE PROCEDURES
Milady Publishing Co.

SECRETARIAL OFFICE PROCEDURES
Southwestern Publishing Co.

TYPING FROM ROUGH DRAFTS
Text-workbook with workpapers packet
Milady Publishing Co.

WRITING BUSINESS LETTERS AND REPORTS
Text-workbook
Bobbs-Merrill Educational Publishing

I. GENERAL INFORMATION

The final version of the business report measures the typist's skill in consistent, attractive, careful typing and proofreading. It is important that each page is uniformly typed with proper spacing and margins. Reports may be typed in the form of a manuscript. Manuscripts or reports may be bound at the left or at the top of the page.

The purpose of a report is to transmit information. To achieve well-proportioned, consistent spacing, the typist should pay attention to centering the work, margins, word division, alignment of numerals, period leaders, and hyphens and dashes. Not all parts are prepared for all reports. Footnotes in a report may be typed in many ways.

If word processors or microcomputers with word processing software are available, this is an excellent time to teach automatic features, such as centering, justifying margins, and automatic pagination. It is also an advantageous point to reinforce text-editing skills.

This is also an excellent time to use typing practice sets or parts of them. Several units and essential elements could be used with one practice set.

II. PREPARATION FOR UNIT

A. Gather resources and references necessary to provide additional information to supplement the unit, such as typing books, office reference manuals, and practice sets.

B. Discuss the unit and specific objectives.

III. UNIT OVERVIEW

A. Interoffice memorandums

1. Discuss the parts of a memorandum.
2. Have students look at Samples 1 and 2 of interoffice memorandums.
3. Discuss the procedures for preparing a memorandum.

B. Tables and charts

1. Discuss the procedures for preparing tables.
2. Provide typing and secretarial reference books for reviewing procedures for centering vertically and horizontally.
3. Have students look at Sample 3 of a typed table.

C. Minutes of a meeting

1. Discuss the information included in the minutes of a meeting.
2. Have students look at Sample 4 of typed minutes.
3. Discuss the procedures for preparing minutes of a meeting.

D. Formal Business Reports

1. Discuss the characteristics of a formal business report.
2. Have students look at Sample 5 of a formal business report.
3. Discuss the parts of a formal business report.
4. Discuss the proceudres for preparing a formal business report.

IV. STUDENT ACTIVITIES

Various student activities can be used to reinforce the information studied.

A. OCL Activity Sheets

B. Typing practice sets

C. Text-workbooks for typing and text-editing

D. Software for microcomputers in developing editing skills.

V. UNIT TEST

A. Various approaches may be used in testing

B. Add test parts corresponding to any information areas or sheets added to the unit.

I. PURPOSE OF A REPORT

To give current information about a subject in a form that is easily understood and useful to the person(s) receiving the report

II. TYPES OF REPORTS

A. Formal Business Reports

(NOTE: The following information is for typing business reports in an office, not educational reports.)

1. Characteristics of a formal business report
    - a. Is single-spaced to save space and paper
    - b. Uses left-bound margins so the report may be placed in a folder or binder, or stapled.
    - c. Uses an elite typing element to save space
    - d. Places the summary, conclusion, and recommendation at the beginning of the report
    - e. Uses illustrations, tables, and charts to present information
    - f. Uses the endnote system of footnoting
2. Parts of a formal business report. A formal business report may contain any or all the following parts.
    - a. Introductory pages
        - (1) Title page. The cover sheet for the report, which includes the title of the report, name of person who prepared the report, name(s) of person(s) to whom the report is to be distributed, and the date of distribution.
        - (2) Table of contents. An outline of the contents of the report, which is prepared after the body of the report is typed.
        - (3) List of illustrations. A list of illustrations, with page numbers, which is placed after the table of contents page.
        - (4) Abstract or preface. May be a separate page or may be included in the body of the report. The abstract provides a quick overview of what the report is about without the reader having to read through the entire report.
    - b. Body of the report. The following parts are typed in paragraph form with headings:
        - (1) Summary. Provides the reader with a short statement of the findings of the report.
        - (2) Conclusions and recommendations States the outcome of the report and any specific ideas of what needs to be done to correct a situation.
        - (3) Support data. The information necessary to back up the summary, conclusions, and recommendations.
    - c. Supplementary pages
        - (1) Appendix. This section provides any additional materials needed to clarify or support the report presented. A cover page is prepared to separate this section from the body of the report.

        (2) References. Provides a complete listing of those materials that were used in preparing the body of the report. A cover page is prepared to separate this section from the other parts of the report.

3. Preparing a formal business report

    a. Side margins. Use 1 1/2" left margin and a 1" right margin.

    b. Top margins. Center and type the title in all caps on line 13 of the first page. Begin all other pages on line 7.

    c. Bottom margins. Leave at least a 1" bottom margin on all pages.

    d. Center point. Move the center point 1/2" to the right of the original center point to offset the left-bound margin of the report.

    e. Spacing. Single-space the report unless otherwise instructed. Double-space between the paragraphs and block or indent the paragraphs.

    f. Page numbers. Introductory pages are numbered with small Roman numerals. All pages within the body of the report are numbered consecutively with Arabic numerals. Pages may be numbered in one of the following ways:

        (1) Centered in the bottom margin

        (2) Centered in the top margin

        (3) Typed at the top right margin on line 4

    g. Headings.

        (1) Centered headings. Centered and typed in all caps with a triple-space before and a double-space after the heading.

        (2) Side headings. Typed at the left margin with a triple-space before and a double-space after the heading. Side headings may be typed in all caps or in capital and lower case letters, and underlined.

        (3) Paragraph headings. Indent and begin typing the heading. Capitalize only the first word and underline the entire heading. Type a period at the end of the heading and begin the paragraph. Leave a double-space above the heading.

    h. Footnotes. Follow these steps in preparing footnotes using the endnote system:

        (1) Type the name of the author, with the page number of the quoted material, in parentheses after the quote in the body of the report.

            EXAMPLE
            .....footnoting reports (Hill:12).

        (2) If two or more publications by the same author are used, place the date of the publication between the author's name and page number.

            EXAMPLE
            .....footnoting reports (Hill:1975:12).

i. Title page. Center the information vertically and horizontally on the page. Type the title of the report in all caps and the remainder of the title page in upper and lower case letters.

j. Table of Contents and List of Illustrations. Type on separate pages, with the titles centered and typed in all caps on line 13. Use leaders to connect the listings to the page numbers. Single-space the listings and indent any additional lines. Double-space between each listing.

k. Abstract or preface. If the abstract is typed on a separate page, center the heading, Abstract, and type in all caps on line 13. Triple-space down to begin the first paragraph of the abstract.1

l. References (Bibliography). Center and type the title in all caps on line 13. Triple-space down from the title to begin the listings, which are in alphabetical order by the authors' last names. The first line of each listing is typed at the left margin, with additional lines indented. Single-space the listings and double-space between entries.

B. Minutes of Meetings

Minutes of a meeting provide information about what happened at a meeting and are an official, permanent record of the meeting.

1. Information included in the minutes are:

a. A title, which includes the type of meeting held and date

b. The body of the minutes, which includes the date, time, and place of the meeting, those present and absent, the purpose of the meeting, and a summary of what occurred during the meeting

c. A signature line for the person who recorded the minutes of the meeting.

2. Preparing the minutes

(NOTE: The format for minutes will vary from business to business. Refer to the files in the office to determine the correct format.)

a. Top margin. Leave a 1" top margin.

b. Side margins. Use 1" side margins.

c. Title. Center and type the main title in all caps on line 7. Double-space and type the subtitle in upper and lower case letters.

d. Body of the report. Single-space the body of the report. Use block style paragraphs and double-space between the paragraphs.

(NOTE: Some reports are double-spaced with indented paragraphs.)

e. Signature line. Type the name and title of the person preparing the report four lines below the body of the report at the center point.

C. Financial statements

1. The balance sheet

a. A balance sheet has three parts:

(1) Assets (what the business owns)

(2) Liabilities (what the business owes)

(3) Stockholders' equity or capital (the owner's share of the business)

b. On every balance sheet, the total assets always equal the total liabilities.

c. The format of a balance sheet should allow the reader to see at a glance that the assets equal the liabilities.

2. The income statement

a. An income statement shows whether a company has made or lost money during a given period of time.

b. The time period covered by the income statement is called the fiscal period.

c. The income and expenses for the company during the fiscal period are recorded on the income statement.

3. The steps involved in producing a typewritten financial statement are as follows:

a. Checking the accuracy in calculations

b. Typing the financial statements

(1) Every financial statement must have a heading.

(2) Indent from the left to indicate groups of similar items.

(3) Align the decimal points vertically in a column of figures.

(4) Type a line as long as the longest line under the last figure to indicate addition or subtraction.

(5) Type double lines under the last figure in a column.

(6) Use the dollar sign with the first figure listed in each column.

(7) Be consistent with the format that is used.

c. Proofread the Final Product

(1) Ask someone to read figures to you.

(2) To proofread columns of dollar amounts, read down the columns, rather than across.

D. Legal Documents

1. Legal documents may be typed on 8 1/2- by 11-inch paper or legal size (8 1/2- by 14-inch) ruled or unruled paper.

2. Minimum margins of two inches at the top and one inch at the bottom are usually allowed.

3. Leave two blank lines between the title of the document and the first line of type.

LANGUAGE USAGE

75.89(a)(3)(c) OFFICE EDUCATION ESSENTIAL ELEMENT
EFFECTIVE COMMUNICATION

Identify and apply correct language usage skills in business

LANGUAGE USAGE

UNIT OBJECTIVE

The student will be able to identify and apply correct language usage skills in business correspondence.

SPECIFIC OBJECTIVES

1. Know and demonstrate the use of the eight parts of speech.
2. Know and apply spelling rules.
3. Define seven purposes of punctuation marks.
4. Identify rules for capitalization.
5. Define four rules for using abbreviations.
6. Demonstrate four tips for writing sentences.
7. Define two types of clauses.
8. Identify three types of sentences and rules for writing sentences.

TEACHER ACTIVITIES

1. Preview the unit.
2. Gather resources and references.
3. Obtain audiovisual series, "Developing and Improving Written Communication," from OCL to use as an instructional aid.
4. Preview each audiovisual presentation and choose a point in the lesson where it will have the greatest impact.
5. Give a five-minute written spelling test at the beginning of each class period.
6. Select exercises and drills from outside resources to complement this unit.
7. If microcomputer or word processing software is accessible in this area, use it to reinforce knowledge.

STUDENT ACTIVITIES

Demonstrate the ability to:

1. Select verbs
2. Select nouns and pronouns
3. Select pronouns
4. Select personal pronouns
5. Select adjectives and adverbs
6. Select prepositions
7. Correctly spell words
8. Correctly insert punctuation marks
9. Capitalize words correctly
10. Express numbers in correct form
11. Apply rules for using abbreviations
12. Write correct sentences

EVALUATION Unit Test

ESTIMATED COMPLETION TIME 5-10 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources.

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section

RESOURCES

BASIC LANGUAGE SKILLS
text/workbook
Glencoe Publishing Co.

BUSINESS ENGLISH BASICS FOR CAREER ADVANCEMENT
Software program for grammar skills for Apple IIe and IIc
Bobbs-Merrill Educational Publishing Company

BUSINESS ENGLISH 3/C
textbook
Bobbs-Merrill Educational Publishing Company

BUSINESS SPELLING AND WORD POWER
Bobbs-Merrill Educational Publishing

COMMUNICATION SKILLS FOR THE PROCESSING OF WORDS
text/workbook
Southwestern Publishing Co.

DEVELOPING EDITING SKILLS
text/workbook and software
Gregg/McGraw-Hill

EFFECTIVE ENGLISH FOR BUSINESS COMMUNICATION
Southwestern Publishing Co.

ENGLISH FUNDAMENTALS
MacMillan Publishing Co.

ENGLISH MADE EASY
text/workbook
Gregg/McGraw-Hill

ENGLISH STYLE SKILL-BUILDERS: A SELF IMPROVEMENT PROGRAM FOR INFORMATION PROCESSORS
Gregg/McGraw-Hill

HELP WITH BUSINESS ENGLISH
text-workbook
Houghton Mifflin

INTEGRATED KEYBOARDING/ COMPUTER SKILLS
text/workbook
Southwestern Publishing Co.

INTENSIVE CLERICAL AND CIVIL SERVICE TRAINING
text/workbook
Southwestern Publishing Co.

PRO-GRAMMAR/PRO-SENTENCE
text/workbook with disks for TRS-80 and Apple IIc microcomputers
Southwestern Publishing Co.

PUNCTUATION: A PROGRAMMED APPROACH
text/workbook
Southwestern Publishing Co.

REFERENCE MANUAL FOR OFFICE PERSONNEL
manual and study guides
Southwestern Publishing Co.

SPELLING: A MNEMONICS APPROACH
text/workbook
Southwestern Publishing Co.

SPELLING SKILLBUILDER
text/workbook
Southwestern Publishing Co.

WORD PROCESSING SKILLS AND SIMULATIONS
Bobbs-Merrill Educational Publishing Company

75.89 (a)(3)(c)

OBJECTIVE: The student shall be able to identify and apply correct language usage skills in business correspondence.

	MASTERY	NON MASTERY
1. Demonstrate the use of the eight parts of speech.		
2. Apply spelling rules.		
3. Define seven purpsoes of punctuation marks.		
4. Identify rules for capitalization.		
5. Define four rules for using abbreviations.		
6. Demonstrate four tips for writing sentences.		
7. Define two types of clauses.		
8. Identify three types of sentences and rules for writing sentences.		

PERFORMANCE CHART

I. PREPARATION FOR UNIT

A. Preview the unit. Gather any resources and references to provide additional information to supplement the unit.

B. Administer pretest to determine the areas in which students experience the greatest number of problems.

1. Use pretest provided in the General Clerical Publications, Unit I; use tests available from other publishers; or develop your own pretests.

2. Select Information Sheets and Activity Sheets for students to complete based on the results of the pretests.

C. Obtain the audiovisual series, "Developing and Improving Written Communication," from the Occupational Curriculum Laboratory to use as an instructional aid with this unit.

1. Preview each presentation and determine how it will be used with the unit.

2. Choose a point in the lesson where the presentations will have the greatest impact.

3. Duplicate the appropriate activities that are provided with the audiovisuals to provide students with the additional practice needed to attain the objectives.

D. Arrange for an employer and/or secretary to speak to the class on the importance of developing good language usage skills and how these skills are used on the job.

E. Give a five-minute written spelling test at the beginning or end of every class period.

F. Encourage students to watch for language usage errors in everything they read and to listen as others speak to raise their awareness of correct usage.

G. If microcomputer or word processing software is available for this subject, this is an excellent tool for reinforcement.

II. OBJECTIVE SHEET

A. Discuss the unit and specific objectives.

B. Add objectives for any information added to the unit.

III. UNIT TEST

A. The test covers information in the unit overview.

B. Various approaches may be used in testing.

1. Administer the test upon completion of the entire unit.

2. Use tests as daily quizzes.

3. Use tests as activity sheets.

C. Add test parts corresponding to any information added to the unit.

IV. ANSWERS TO UNIT TEST

A. Answers are provided.

B. Prepare answers for any test parts added to the test.

I. INTRODUCTION

A. Grammar means, simply, the correct use of words in sentences.

B. Grammar, which deals with how the parts of speech function in a sentence, can be defined as the "science of language."

C. The word grammar comes from the Greek word gramma, which means letter, or written symbol.

D. Through correct use of grammar, a person can give to another person the clear meaning of the message intended.

E. Because writing cannot contain gestures, voice inflections, or tone changes to help convey meaning, correct use of words is necessary.

II. PARTS OF SPEECH

There are eight basic classifications for parts of speech. The basic function of a word is determined by how it is used with other words in a sentence.

A. Verb

1. A word that expresses action, a state of being, or occurrence

2. The most important word in the sentence because it is the word that gives life and purpose to the other words

3. Most verbs are action verbs, and even one verb can be a sentence.

EXAMPLE: Halt! (The subject you is understood.) The copies flew out of the machine. (Action) The copies are clear. (State of being)

B. Noun

1. A word that names something, such as a person, place, thing, quality, idea, or event

2. Called naming words, which are next in importance to verbs in a sentence

3. Four types of nouns

a. Common nouns--the ordinary names of objects, human beings, animals, places, etc.

EXAMPLES: book, microcomputer, student, teacher

b. Proper nouns--the names of particular persons, places, and things; begin with a capital letter

EXAMPLES: Bible, Minolta, Charlie, Mrs. Jones

c. Abstract nouns--the names of conditions and qualities

EXAMPLES: Happiness, warmth, beauty, bravery

d. Collective nouns--the names of collections or groups of persons, animals, and things

EXAMPLES: team, family, class, committee

4. Characteristics of nouns

a. Usually, nouns are preceded by such words as a, an, my, the, each, every, that, etc.

EXAMPLE: The girl went to town. An apple is a fruit.

b. Usually, nouns are found in set positions.

(1) Before a verb
EXAMPLE: A dog
V
barks.

(2) After a verb
V
EXAMPLE: Clean the machine.

(3) After a preposition

EXAMPLE: Going to the circus

c. Some nouns have characteristic endings which distinguish them from corresponding verbs or adjectives.

EXAMPLE: al, tion, ment, ance, ism, ness

verb - arrive
content
rely
soft

noun - arrival
contentment
reliance
softness

C. Pronoun

1. A word that is used as a substitute for a noun

2. Pro means "for"--thus pronoun.

3. The more commonly used pronouns are:

a. Personal pronoun--a substitute for persons or things

EXAMPLE: I, me, you, he, she, it, we, they

b. Possessive pronoun--a substitute for things that are possessed

EXAMPLE: mine, his, yours, theirs, etc.

c. Interrogative pronoun--a pronoun that asks a question

EXAMPLE: who, whom, which, what

D. Adjective

1. A word that describes or limits (gives qualities to) a noun

EXAMPLES: a boat, American flag, the girl

2. Adjectives answer such questions as: which? what kind? how many?

3. Adjectives may

a. Precede a noun

EXAMPLE: Mark is a tall boy.

b. Follow a linking verb and modify the subject

EXAMPLE: He is tall.

c. Follow a noun

EXAMPLE: The teacher, calm and serene, began to lecture.

4. Many adjectives are formed by adding the suffixes able; ible; al; ant; ent; ar; ary; ful; ic; ical; ish; ive; less; ous; or y to other words.

EXAMPLE: depend
dependable

E. Adverb

1. A word that modifies or describes a verb, an adjective, or another adverb

EXAMPLE: She is a very smart student. She types fast He talks very slowly.

2. Adverbs answer such questions as how, when, and where.

3. Many adverbs end in ly.

EXAMPLE: slowly, carefully, quickly, etc.

4. Some frequently used adverbs are: after, too, now, before, there, quite, etc.

F. Preposition

1. A word that introduces a phrase; a linking or connecting word

EXAMPLE: She lives in a small town near Dallas. After lunch, I took a nap.

2. Some frequently used prepositions are: to, about, in, on, before, by, etc.

(NOTE: Refer to a grammar book for a more complete list.)

G. Conjunction

1. A word that connects words, phrases, and clauses

   EXAMPLE: Bill and Mary went on a trip. I would like to go, but I am very busy.

2. Some frequently used conjunctions are: and, or, nor, but, since, because, if, etc.

H. Interjection

1. A word that interrupts the rhythm of the sentence to express feeling

   EXAMPLE: Oh, I didn't see you sitting there! Ah, I believe I know the answer.

2. Some frequently used interjections are ah, alas, please, oh.

SPELLING

I. TERMS AND DEFINITIONS

A. Accent--the way a certain syllable is stressed in a word

B. Consonant--a speech sound represented by any letter in the alphabet except a, e, i, o, u, and sometimes y

C. Prefix--something placed before

   EXAMPLE: social antisocial

D. Pronunciation--putting the parts of written words into sounds; saying the word

E. Suffix--something placed after

   EXAMPLE: fault faultless

F. Syllable--a segment or part; the smallest unit of speech or writing

G. Vowels--speech sounds represented by a, e, i, o, u, and sometimes y

II. INTRODUCTION

A. Correct spelling is necessary for clear communication.

B. Correct spelling helps avoid confusion and misunderstanding.

C. Correct spelling will save time by eliminating the need to correct spelling errors.

D. Correct spelling requires that you take the time to look up a word in a dictionary or word book when in doubt about how to spell it.

III. SPELLING TIPS AND SUGGESTIONS

A. Learn to pronounce words correctly.

B. Learn to recognize when a word doesn't look right.

C. Use the dictionary to find words you cannot spell.

D. Use some sort of memory device to help you remember how a word is spelled.

E. Learn some simple rules for spelling.

F. Be careful about your spelling.

G. Make a list of commonly misspelled words to refer to when necessary.

IV. SIMPLE SPELLING RULES

A. Words containing ie or ei

1. You probably learned this rule in the fourth grade, but it's a good one to remember:

   Write i before e
   Except after c,
   Or when sounded like a
   As in neighbor and weigh.
   Either, neither, leisure, seize are exceptions; watch for these.

   EXAMPLES: achieve, niece, piece

2. Or "when the letter c you spy, place the e before the i."

   (NOTE: These rules apply only when the pronounciation of ei is a long e, as in he, or has the a sound, as in pale.)

   EXAMPLE deceive
   conceit
   perceive

3. ie is the usual spelling when followed by an r.

   EXAMPLES: frontier, pier, fierce

B. Final y

1. When ending in y--preceded by a consonant--usually change the y to i before any suffix except one beginning with an i (ing, ish, ist).

   EXAMPLE: copy, copies, copying

2. Words ending in y preceded by a vowel do not change the y to i.

   EXAMPLE: convey
   conveying

C. Doubling final consonant

1. Double the consonant in a one-syllable word if it is preceded by a vowel and if the suffix begins with a vowel.

   EXAMPLE: plan, planning, planned

2. Double the consonant in a two-syllable word when the accent is placed on the last syllable and if it is preceded by a vowel and the suffix begins with a vowel.

   EXAMPLE: refer,
   referring,
   referred

D. Final e

1. Usually, words ending with a silent e generally drop the e before a suffix beginning with a vowel.

   EXAMPLE: deprive,
   depriving,
   punctuate,
   punctuating

2. Keep the e when adding a suffix beginning with a consonant.

   EXAMPLE: achieve,
   achievement

3. Keep the silent e when the suffix "able" or "ous" is added to words ending with the soft sound of "ce" or "ge."

   EXAMPLE: manage,
   manageable,
   outrage,
   outrageous

E. Add s or es

1. Add es when a word ends in s, ch, sh, or x.

   EXAMPLES: arch arches
   brush brushes
   process
   processes

2. Add an s to some words ending in o; in others, add an es.

   (NOTE: When in doubt, check a dictionary.)

   EXAMPLES: bucko buckos
   coco cocos
   ratio ratios

3. Drop the y and add ies when words end in a consonant plus y.

   EXAMPLES: rarity
   rarities
   proxy proxies
   family
   families

4. Add an s when words end in a vowel plus y.

   EXAMPLES: monkey
   monkeys
   attorney
   attorneys

PUNCTUATION

I. TERMS AND DEFINITIONS

A. Appositive--a word or group of words that renames the noun that precedes it

B. Coordinating adjectives--two or more adjectives that modify the same noun and are not separated by a conjunction

C. Independent clause--a group of words that can stand alone as a sentence

D. Introductory words or phrases--words and phrases that are not necessary to the meaning of the sentence but help to connect the thoughts in one sentence to those in another

E. Parenthetical--words and phrases that provide additional information, clarify information given, or contrast an idea with the main part of the sentence; often found within and at the end of a sentence

F. Phrase--a group of words that does not contain a subject and a predicate

II. INTRODUCTION

A. Uses of punctuation marks

   1. To make clearer the meaning of what is written

   2. To help make reading easier by the way they stop the eye or slow the thought process

B. Purposes of punctuation marks

   1. To end or terminate a statement

   2. To introduce

   3. To enclose

   4. To indicate an omission

   5. To separate sentence parts

   6. To indicate possession

   7. To show word division at the end of a line

C. Types of punctuation marks

.	period
!	exclamation point
-	hyphen
()	parentheses
,	comma
--	dash
"	double quotation marks
?	question mark
'	apostrophe
''	single quotation marks
[]	brackets

III. RULES FOR PUNCTUATION

(NOTE: Because there are so many rules for using punctuation marks, they are not all covered in this section. Refer to a reference manual when in doubt concerning the use of punctuation marks.)

A. Comma

1. To separate independent clauses joined by a coordinating conjunction (and, but, or, nor)

   EXAMPLE: We are going home, but Jackie will stay with you.

2. To separate words, phrases, and clauses in a series

   EXAMPLE: Tammy, Jim, and Mike will be attending the meeting.

3. After introductory words and phrases

   EXAMPLE: Before she made the appointment, she checked her calendar.

4. To set off parenthetical expressions in sentences

   EXAMPLE: We are, however, unable to meet with you at this time.

5. To set off an appositive

   EXAMPLE: The director, Jean Moore, attended the meeting.

6. Between coordinating adjectives

   EXAMPLE: She was a very dependable, competent secretary.

7. To set off a direct address

   EXAMPLE: Thank you for your order, Mrs. McKenzie.

8. To show ommissions of words that are easily understood from the context of the sentence

   EXAMPLE: The first order will be shipped on November 13 and the second, on December 1.

9. To set off a direct quotation from the rest of the sentence

   EXAMPLE: "The meeting will be held in the conference room," announced the director.

10. To separate words that are repeated for emphasis

    EXAMPLE: We are very, very happy about your promotion.

11. To set off titles, degrees, and seniority designations that accompany a person's name

    EXAMPLE: Jennifer Schew, M. D., assumes her new position on January 1.

12. To separate the day of the week from the month and the month from the year

    EXAMPLE: Friday, November 13, 1982

13. To separate thousands, hundred thousands, millions, etc., in numbers consisting of four or more digits

    EXAMPLE: $1,226,000

B. Semicolon

1. Between clauses in a compound sentence when the two clauses are not joined by a conjuction

    EXAMPLE: The copier is out of order; the drum has to be replaced.

2. Before a conjunctive adverb (however, therefore, otherwise) when the adverb joins two independent clauses

    EXAMPLE: The copier is out of order; otherwise, you could make the copies you need.

3. Between independent clauses that are joined by a conjunction if either or both of the clauses contain internal commas

    EXAMPLE: Bob, Ted, and Alice will attend the conference in Atlanta; and Diane will attend the one in Dallas.

4. Between members of a series when one or more of the members contains a comma

    EXAMPLE: The new officers are: Mary Thompson, president; Jim Smith, vice president; and Tom Jones, secretary.

C. Colon

1. After an expression such as these or the following when that expression is used to introduce a series of items

    EXAMPLE: You will need the following items when you take the test: a reference manual, pencil, and paper.

2. To separate an introduction from a long quotation

    EXAMPLE: President Kennedy used this quotation in his inauguration address: "Ask not what your country can do for you; ask what you can do for your country."

3. To introduce lists, tabulations, enumerations, words, or phrases

    EXAMPLE: Do these things before you leave the office: clean up the coffee room, lock the file cabinets, turn off the lights, lock the door.

4. In place of the words that is or for example after a statement that introduces an example or an explanation that clarifies the beginning of the sentence

    EXAMPLE: We have to make a decision: to leave this work unfinished or to stay late at the office.

5. After the salutation of a business letter if a comma is used after the complimentary close

    EXAMPLE: Dear Ms. Glasco:

6. Between the hours and minutes in clock times that are expressed in figures

    EXAMPLE: 10:45 a.m.

D. Dash

1. To emphasize a word or group of words

    EXAMPLE: The car was flashy, long, powerful--and expensive.

2. To indicate a break or shift in thought

   EXAMPLE: That car--the one with the personalized license plate--belongs to the president of the Chamber of Commerce.

3. To indicate an omission of letters and words and to connect combinations of letters and figures

   EXAMPLE: from 9--5
   1962--1981

E. Parentheses

1. To enclose material that is supplementary or explanatory

   EXAMPLE: In the following sentences, circle the correct pronoun (refer to Chart 1 on page 55).

2. To enclose figures to indicate an enumeration

   EXAMPLE: You will need the following items: (1) a reference manual, (2) a pad, and (3) a pencil.

3. To enclose numbers that follow the written number to insure accuracy

   EXAMPLE: The car is five (5) years old.

CAPITALIZATION AND EXPRESSION OF NUMBERS

I. RULES FOR CAPITALIZATION

(NOTE: Always consult a reference manual when in doubt about capitalization and expression of numbers.)

A. Always capitalize the first word of every sentence, and this applies to every quoted sentence.

   EXAMPLE: I went to town. Mary said. "I went to town."

B. Always capitalize proper nouns.

1. Names of people and titles used for specific persons

   EXAMPLE: John Smith, Mary Jones, Mayor Tom Young

2. Names of countries, states, regions, localities, geographic areas, etc.

   EXAMPLES: France, Texas, Arkansas, the Blue Ridge Mountains, the Sahara Desert, Lake Erie, the Midwest, Western Civilization, the Panhandle.

3. Names of the months and days of the week

   EXAMPLES: February, March, Sunday, Monday, but never the seasons: spring, summer

4. Trade names--Xerox, Frigidaire, Vaseline; but not generic names--copier, refrigerator, petroleum jelly

5. Names of historic events, eras, holidays

   EXAMPLES: Civil War, Yom Kippur, Labor Day, Christmas, Thanksgiving, the Great Depression

6. Titles of high government officials

   EXAMPLES: President Reagan, or Ronald Reagan, President of the United States; Cabinet members, Senators, Representatives, Chief Justice

7. Titles that precede the name of the person--President Charlie Jones; but not titles that follow the name--Charlie Jones, president of City University

8. Names of academic degrees and honors when following a personal name, whether abbreviated or in full

   (NOTE: When academic degrees are referred to in such general terms as doctorate, bachelor's masters, etc., they are not capitalized.)

   EXAMPLE: Clarence J. Professor, Doctor of Law
   John K. Healer, M.D.
   Roderick England, Fellow of the Royal Academy

C. Always capitalize every important word in the title of a book, play, magazine, musical composition.

   EXAMPLE: book - The Old Curiosity Shop
   play - Much Ado About Nothing
   magazine - Better Homes and Gardens
   music - "The Star-Spangled Banner"

D. In an outline, always capitalize the first word at the beginning of each item beside a letter or number.

II. RULES FOR EXPRESSION OF NUMBERS

A. Write the number as a word if it appears at the beginning of a sentence.

   EXAMPLE: Twenty-five students enrolled in the communication course.

B. Write numbered street names (one--ten) as words.

   EXAMPLE: The employment agency is located on Tenth Avenue. I live on 42nd Street.

C. Write these numbers as figures:

1. Credit card, telephone, model, invoice, serial, and similar numbers

   EXAMPLE: My credit card number is 95908-4999. If you need any further information, call 512/821-9620.

2. A date that follows the name of a month

   EXAMPLE: I was born on December 25.

3. A year

   EXAMPLE: She taught here from 1976 through 1979.

4. Dollar amounts

   EXAMPLE: The copier cost $6,000 and we charge 10 cents for each copy made.

5. Percentages and discount terms

   EXAMPLE: We received a 10 percent discount by paying our bill within 10 days.

6. Measurements

   EXAMPLE: When mailing the report, use a 9-inch envelope.

D. Write the numbers one through ten as words and the numbers above ten as figures.

   EXCEPTION: If you are referring to a particular number, write the number as a figure.

   EXAMPLES: There will be four students attending the leadership conference.

   There will be a run-off between contestants 1 and 5.

E. Write all numbers in figures if a series of three or more numbers appear in a sentence.

EXAMPLE: There were 20 contestants entered in Shorthand I, 3 entered in Shorthand II, and 10 in Information-Communication I.

F. Write one number in words and the other in figures when two numbers occur next to each other in a sentence.

(NOTE: The one written in words should be the one that is the easiest to spell out.)

EXAMPLE: Order three 3-pound packages and one 12-pound package of sausage.

G. Write fractions that stand alone as words; however, a series of fractions or a fraction that accompanies a whole number should be expressed in figures.

EXAMPLES: You should receive one-third of the refund this afternoon.

The paper measures 8½ inches across.

H. Use figures to express times that accompany a.m. or p.m., but spell out an on-the-hour time.

EXAMPLES: The plane departs at 10:25 a.m. and arrives in Houston at 11 a.m.

The meeting begins at one o'clock.

ABBREVIATIONS

I. RULES FOR USING ABBREVIATIONS

A. Use abbreviations to save space in such materials as tables, statistical matters, footnotes, etc.

B. Be consistent. Do not abbreviate one time, then spell out the word the next time it is used.

C. Use a dictionary to check the proper abbreviation of words if you are in doubt.

D. Use the abbreviation of a word rather than the contraction.

II. RULES FOR PERSONAL NAMES

A. Spell out personal names; do not abbreviate.

(NOTE: Saint may be abbreviated, St.)

EXAMPLE: William, not Wm.
George, not Geo.

B. Always abbreviate Mister (Mr.), Mistress (Mrs.), Ms, Doctor (Dr.), in front of a person's name.

EXAMPLE: Dr. Sherry North

C. Abbreviate a title that is used with both a first and last name.

EXAMPLE: Rep. Sam Hall

D. Do not abbreviate a title when it is used with a last name only.

EXAMPLE: Representative Hall
Senator Tower

E. Abbreviate seniority titles, academic degrees, or designation of a religious order when it follows a full name.

(NOTE: Place periods after each part of the abbreviation.)

EXAMPLE: E. W. Rountree, Jr.
Jill Smith, LL.D.

III. MISCELLANEOUS RULES

A. Use the abbreviated form of a company or organization name if it is best known by this form.

(NOTE: Do not use periods in the abbreviation.)

EXAMPLE: ABC--American Broadcasting Company
OEA--Office Education Association

B. Abbreviate names of countries and states when used in addresses.

(NOTE: Use the two-letter abbreviations approved by the United States Postal Service.)

EXAMPLE: P.O. Box 752,
Commerce, TX 75428

C. Spell in full the names of countries and states when used in sentences.

EXAMPLE: We will visit Texas, New Mexico, and Colorado during our vacation.

D. Do not abbreviate the name of a city.

(NOTE: Saint may be abbreviated St.)

EXAMPLE: Los Angeles, not L.A.
Fort Worth, not Ft. Worth

E. Always abbreviate

1. Time periods of the day

(NOTE: Type in lower case letters followed by periods. In printing, small capital letters may be used if available.)

EXAMPLE: 9:15 a.m. and 3:30 p.m.

2. Designations of time zones

EXAMPLE: 11:10 p.m. (CST)

3. Commonly used business abbreviations

EXAMPLE: FOB (free on board)

F. Do not abbreviate

1. Compass points such as north or northeast, unless they are used after street names to indicate a part of a city

EXAMPLE: My house is south of Culver on Jackson Street, E.

2. Names of days or months

EXAMPLE: Monday, not Mon.
January, not Jan.

3. Units of measurement, unless they are used with numbers in a table, on an invoice, etc.

EXAMPLE: Use one gallon of water to one tablespoon of lime.

4. The words noon or midnight

WRITING SENTENCES

I. TERMS AND DEFINITIONS

A. Clause--a group of related words containing a subject and a predicate

B. Collective noun--a word that gives a name to something that is made up of several persons, objects, or units, such as class, group, team

C. Modifier--anything that limits, qualifies, or adds to (elaborates or expands) another unit of the sentence

EXAMPLE: That copier
M S
reproduces
P
accurately.
M

D. Phrase--a group of related words that does not contain both a subject and a predicate

E. Predicate--some declaration about the subject; is often made up of a verb plus a complement (something that completes the verb)

F. Sentence--a complete thought; the use of words to express a complete thought

G. Subject--something that is talked about; a word (or group of words) that functions as a noun

II. TYPES OF CLAUSES

A. Independent clause

1. Contains a subject and a predicate

2. Expresses a complete thought

3. May stand alone as a complete sentence

EXAMPLE: The technician repaired the terminal.

B. Dependent clause

1. Contains a subject and a predicate

2. Does not express a complete thought

3. Cannot stand alone as a complete sentence

EXAMPLE: As soon as the terminal is delivered

III. TYPES OF SENTENCES

A. Simple sentence

1. Uses one subject and one predicate to convey a message

2. Makes straightforward statements of fact

3. Adds emphasis when placed among longer, more complex sentences

EXAMPLE: We returned home.

B. Compound sentence

1. Contrasts or compares two closely related ideas

2. Demonstrates how two ideas fit together

3. Uses two independent clauses joined by a coordinating conjunction that makes the relationship of the clauses clear

EXAMPLE: The board members will meet after the dinner, and they will elect a new chairperson.

C. Complex sentence

1. Contains one independent clause and one or more dependent clauses

2. Shows how one thing influences another

(NOTE: The dependent clause relies on the independent clause to give it meaning.)

EXAMPLE: Since the board members will meet in a closed session, we cannot attend.

IV. RULES FOR WRITING SENTENCES

A. Agreement of subject and verb

1. Simple sentences

a. Use a singular verb with a singular subject.

EXAMPLE: He is going to town.

b. Use a plural verb with a plural subject.

EXAMPLE: We are going to town.

2. Compound subjects joined by and

a. Use a plural verb when the elements in a compound subject are joined by the conjunction and.

(NOTE: Use a singular verb when the two elements joined by and are considered one unit.)

EXAMPLE: A reference book and a resume are required for the interview.

My friend and co-worker Diane has helped me a great deal.

b. Use a singular verb if a compound subject is preceded by each or every.

EXAMPLE: Each man and woman at the university is covered by the insurance policy.

3. Compound subjects joined by or and nor

a. Use a singular verb when singular subjects are joined by nor.

EXAMPLE: Neither Pam nor Diane is able to attend the meeting.

b. Use a verb that agrees in number and person with the nearer subject when one subject is singular and one is plural.

EXAMPLE: Either the director or the members are going to the meeting.

4. Nouns in plural form

a. Use a singular verb with nouns that are plural in form but singular in meaning, such as scissors, pants, mumps

EXAMPLE: Physics is being offered next fall.

b. Use a singular verb when a plural noun describes a sum of money, a quantity, or a number.

EXAMPLE: Fifty pounds is a lot of weight to gain in one year.

The $100 is to be used for supplies.

The number of participants has increased from last year's meeting.

5. Collective nouns

a. Use a singular verb if the collective noun is considered as a unit.

EXAMPLE: The class is on a field trip.

b. Use a plural verb if the collective noun is being considered as separate individuals, objects, or units.

EXAMPLE: The faculty are working on their lesson plans.

B. Run-on sentences

To avoid run-on sentences (including too much information in one sentence), follow these rules. Run-on sentence: Karen and Chuck were members of the same committee they gave the same report.

1. Use a comma and a coordinating conjunction to connect the two independent clauses if they are of equal importance.

EXAMPLE: Karen and Chuck were members of the same committee, and they gave a joint report.

2. Use a semicolon without a coordinating conjunction to connect the two independent clauses if they are close enough in thought to make one sentence.

EXAMPLE: Karen and Chuck were members of the same committee; they gave a joint report.

3. Subordinate one of the independent clauses.

EXAMPLE: Because Karen and Chuck were members of the same committee, they gave a joint report.

4. Write the independent clauses as separate sentences.

EXAMPLE: Karen and Chuck were members of the same committee. They gave a joint report.

V. TIPS WHEN WRITING SENTENCES

A. Vary the length and complexity of sentences.

1. Combine related short, choppy sentences into one sentence that flows more smoothly.

INCORRECT: We completed our work. We went home.

CORRECT: When we completed our work, we went home.

2. Use several sentences to avoid having a long "run-on sentence."

   INCORRECT: Jack and Diane went to see a Neil Simon play the other night they said it was the funniest play they had ever seen.

   CORRECT: Jack and Diane went to see a Neil Simon play the other night. They said it was the funniest play they had ever seen.

B. Use only the words necessary to convey the meaning of the sentence.

   1. Eliminate unnecessary words.

   2. Be concise; get to the point.

      INCORRECT: The undoubtedly highest and widest circus tent in the world was erected this bright and beautiful morning in a field which was once a meadow just outside of town.

      CORRECT: The world's largest circus tent was erected this morning just outside of town.

C. Write sentences in the active voice (the subject of the sentence is doing something) rather than in the passive voice.

   EXAMPLE: I paid the bill. (Active voice)

   The bill was paid by me. (Passive voice)

D. Use words that clearly express the ideas behind the sentence.

   1. Use "picture" words--words that cause the reader to "see" exactly what the writer is saying.

   2. Use a variety of words to express an idea.

      EXAMPLE: Good
      The furry gray squirrel raced across the snow covered lawn and up the thick trunk of a leafless tree.

      Poor
      The squirrel ran across the lawn and up a tree.

WRITTEN COMMUNICATIONS

75.89(a)(3)(b) OFFICE EDUCATION ESSENTIAL ELEMENT

Prepare effective written communication

UNIT OUTLINE

UNIT OBJECTIVE

The student will be able to prepare effective, well-written communications.

SPECIFIC OBJECTIVES

1. Identify the common purposes of all written communications.
2. Demonstrate the ability to put thoughts into words effectively.
3. Identify the purpose and content of each of the four basic business letters.
4. List the three steps in composing a business letter.
5. Identify four of the pointers for composing a business letter.
6. Demonstrate the ability to:
   a. Compose a letter of goodwill
   b. Compose a letter of request
   c. Compose a letter of positive response
   d. Compose a letter of negative response

TEACHER ACTIVITIES

1. Gather business letters of all types to use for examples of effective written communication.
2. Review and discuss objectives with students.
3. Obtain the slide/tape presentation, Developing and Improving Written Communication: Writing Business Letters from OCL.
4. Prepare transparency masters of sample letters to aid in instruction and discussion.
5. Provide a situation for writing a letter and demonstrate the step-by-step procedure for composing a letter.

STUDENT ACTIVITIES

1. Complete student worksheets for the slide/tape presentation.
2. Compose a letter of goodwill.
3. Compose a letter of request.
4. Compose a letter of positive response.
5. Compose a letter of negative response.

EVALUATION-Unit Test

ESTIMATED COMPLETION TIME 5-10 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

BASIC ENGLISH FOR BUSINESS COMMUNICATIONS
textbook
Glencoe Publishing Co.

BASIC LETTER AND MEMO WRITING
Southwestern Publishing Co.

BASIC WRITING SKILLS FOR BUSINESS
4 filmstrips and cassettes, 16 duplicating masters, teacher's guide, resource manual, and storage container.
Career Aids, Inc.

BUSINESS COMMUNICATIONS
activities book and teacher's guide
Glencoe Publishing Co.

BUSINESS ENGLISH ESSENTIALS
McGraw-Hill Book Company

BUSINESS LETTERS AND REPORTS
Bobbs-Merrill Publishing Co.

BUSINESS LETTER WRITING
Instructive Material Laboratory
Ohio State University
Columbus, OH

COMMUNICATIONS: YOUR BRIDGE TO OTHERS
disk; Apple II, IIe, or IIc
IBM PC
Career Aids, Inc.

COMPETENCY SKILLS: WRITING ON THE JOB
filmstrips, cassettes, library kit, teacher guide
Career Aids, Inc.

CORRESPONDENCE
film trainee work plan
Prentice-Hall Media

DEVELOPING AND IMPROVING WRITTEN COMMUNICATION: WRITING BUSINESS LETTERS, AN AUDIOVISUAL
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX

EFFECTIVE BUSINESS AND PROFESSIONAL LETTERS
Prentice-Hall Media

EFFECTIVE ENGLISH AND BUSINESS COMMUNICATION
Southwestern Publishing Co.

HUMAN RELATIONS FOR SUCCESS IN BUSINESS
Milady Publishing Co.

JOB WRITING SKILLS
Career Aids, Inc.

ON THE JOB COMMUNICATION
disk, teacher guide
Apple II, IIe, or IIc; TRS-80 Model III or 4
Career Aids, Inc.

ORAL AND WRITTEN COMMUNICATIONS
Career Aids, Inc.

WRITING CLEARLY: CONTEMPORARY APPROACH
Charles E. Merrill Publishing Co.

WRITING, LISTENING, SPEAKING, FOR BUSINESS AND PROFESSIONAL STUDENTS
Wadsworth Publishing Co.
Belmont, CA 94002

WRITTEN COMMUNICATIONS SERIES
slide/tape and guide and assignment
Instructional Materials Lab
University of Missouri

75.89(a)(3)(B)

OBJECTIVE: The student will be able to prepare effective, well-written communications.

	MASTERY	NON MASTERY
1. Identify the common purposes of all written communications.		
2. Demonstrate the ability to put thoughts into words effectively.		
3. Identify the purpose and content of each of the four basic business letters.		
4. List the three steps in composing a business letter.		
5. Identify four of the pointers for composing a business letter.		
6. Demonstrate the ability to:		
a. Compose a letter of goodwill		
b. Compose a letter of request		
c. Compose a letter of positive response		
d. Compose a letter of negative response		

PERFORMANCE CHART

I. GENERAL INFORMATION

A. It is important to stress again the importance of communication skills for success in business.

B. Many materials are available on general communications that could apply to this unit.

C. If this unit is spaced at time later than your communications and human relations units, it would be a good time to reinforce basic communication skills before beginning written communications.

II. PREPARATION FOR UNIT

A. Preview the unit and gather necessary supplies and reference materials for use with the unit.

   1. Obtain samples of letters from various businesses in the community to use during the discussion of the information.

   2. Obtain the slide/tape presentation, DEVELOPING AND IMPROVING WRITTEN COMMUNICATION: WRITING BUSINESS LETTERS, from the source listed in the Resource and Reference section. Preview the presentation and determine how it will be used with the unit.

   3. Develop information sheets for introducing any other types of written communication other than the four included in this unit, as deemed necessary.

   4. Prepare the transparency masters provided in this unit for use on an overhead projector and as handouts for the students.

B. Arrange for a person from the business community to speak to the class on the subject of the importance of communication skills.

C. Design a bulletin board introducing the unit.

   1. Include samples of the four basic types of business letters labeled to indicate the type of letter.

   2. Include samples of the business letters obtained from the business community.

III. OBJECTIVE SHEET

A. Discuss the unit and specific objectives.

B. Add objectives for any information added to the unit.

IV. INFORMATION AND ACTIVITY SHEETS

A. Discuss the purposes of business letters.

B. Discuss the four basic types of business letters.

   1. Use transparencies to clarify the concepts of composing each of the letters.

   2. Use transparencies to point out how each of the letters follow the format suggested.

   3. Discuss other types of business letters, if included.

C. Discuss the steps in composing letters.

   1. Provide a situation for writing a letter and demonstrate the step-by-step procedures for composing a letter.

   2. Discuss the pointers on composing letters.

      a. Use Samples 1, 2, and 3 to facilitate the discussion of how to be concise when writing letters.

      b. Discuss the "you" attitude when writing letters.

NOTES TO THE INSTRUCTOR

    c. Use Sample 4 to facilitate the discussion of using positive language when writing letters.

3. Have students complete the following activities.
    a. Composing a letter of goodwill
    b. Composing a letter of request
    c. Composing a letter of positive response
    d. Composing a letter of negative response
4. Provide additional activities, if necessary, to develop competency in writing business letters.

V. UNIT TEST

A. Covers the materials presented in the information sheet

B. May be used in several ways
    1. Used as a daily quiz
    2. Used as an additional activity
    3. Administered upon completion of the entire unit

C. Provide test questions for any information added to the unit.

I. PURPOSES OF WRITTEN COMMUNICATION

- A. To communicate ideas
- B. To promote desired results

II. FOUR BASIC TYPES OF BUSINESS LETTERS

- A. Letter of goodwill
    - 1. Purposes of the letter
        - a. To thank someone for favorable action or good service
        - b. To congratulate someone on a promotion or other good fortune
        - c. To promote a favorable impression about your company
    - 2. Content of letter
        - a. Paragraph one--used to tell why the letter is being written
        - b. Paragraph two--used to expand on the information given in the first paragraph
        - c. Final paragraph--used to draw the entire message to a logical conclusion and to leave the reader with a positive feeling (to repeat the thanks or congratulations stated at the beginning of the letter)
- B. Letter of request
    - 1. Purposes of the letter
        - a. To ask someone to act in a specified way
        - b. To ask someone to provide a particular service or specific information
        - c. To ask someone to make a contribution to support a stated cause
    - 2. Content of letter
        - a. Paragraph one--used to state the request
        - b. Paragraph two--used to explain why you want the information, product, or service asked for
        - c. Paragraph three--used to motivate the reader to grant your request
        - d. Final paragraph--used to close the letter in a courteous, positive note; may include an offer to do something for the reader or make it easy for the reader to contact you if any problems or questions arise

          (NOTE: In a short letter, three paragraphs may be used by combining paragraphs three and four.)
- C. Letter of positive response
    - 1. Purpose of letter
        - a. To fulfill both business and social obligations
        - b. To grant a request by another person
        - c. To build goodwill for the company
    - 2. Content of letter
        - a. Paragraph one--used to restate the request and to indicate that the request can be granted
        - b. Paragraph two--used to support the first paragraph and to give additional relevant information
        - c. Final paragraph--used to draw the entire message to a logical conclusion in a courteous, positive tone
- D. Letter of negative response
    - 1. Purpose of letter
        - a. To deny a request by another person
        - b. To maintain goodwill
    - 2. Content of letter
        - a. Paragraph one--used to establish goodwill (begin by thanking the reader for the request)

   b. Paragraph two--used to state and explain the refusal in a positive tone

   c. Paragraph three--used to offer an alternative and to clarify that alternative by providing specific information

   d. Final paragraph--used to close the letter in a positive tone by making the reader feel that you are willing to help in any possible way

      (NOTE: In a short letter, three paragraphs may be used by combining paragraphs one and two.)

III. STEPS IN COMPOSING LETTERS

A. Organize

   1. Gather any information needed in writing the letter (correspondence, notes, etc.).

   2. Read through examples of other letters to help you understand how your employer wants letters to sound.

B. Plan

   1. Organize your thoughts before you begin to write.

   2. Develop an outline of points (ideas) to be included in the letter.

   3. Decide on the most logical order in which to express these ideas.

C. Write

   1. Develop a rough draft of the letter.

   2. Read through the draft to insure the following:

      a. Correctness of grammar, punctuation, etc.

      b. Appropriateness of the information included

      c. "Flow" of the message

D. Pointers for composing letters

   1. Be concise; avoid using trite expressions or unnecessary words.

   2. Use words, phrases, or clauses that enable the message to flow from one thought to another.

   3. Write in the "you" attitude. Keep in mind the reader's point of view when writing the letter; put the reader's interests first.

   4. Use positive language when writing a letter to avoid planting negative impressions in the reader's mind.

   5. Write as if you were speaking to the reader to make your correspondence sound more personal.

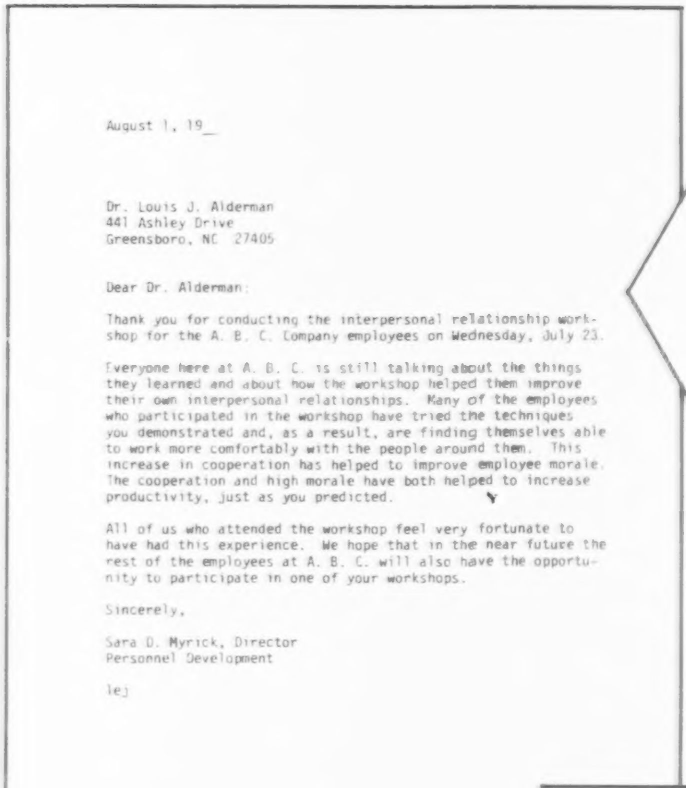
   6. Use a variety of sentence structures (simple, complex, etc.) in each message to maintain the reader's interest.

   7. Keep paragraphs short (one to five sentences) to avoid confusion.

   8. Maintain goodwill by suggesting rather than demanding, by not making accusations, and by offering alternatives when appropriate.

   9. Proofread the letter to be sure that the letter is placed attractively on the page, that it has been typed accurately, and that it states clearly the message intended.

WRITING BUSINESS LETTERS



August 1, 19__

Dr. Louis J. Alderman
441 Ashley Drive
Greensboro, NC 27405

Dear Dr. Alderman:

Thank you for conducting the interpersonal relationship workshop for the A. B. C. Company employees on Wednesday, July 23.

Everyone here at A. B. C. is still talking about the things they learned and about how the workshop helped them improve their own interpersonal relationships. Many of the employees who participated in the workshop have tried the techniques you demonstrated and, as a result, are finding themselves able to work more comfortably with the people around them. This increase in cooperation has helped to improve employee morale. The cooperation and high morale have both helped to increase productivity, just as you predicted.

All of us who attended the workshop feel very fortunate to have had this experience. We hope that in the near future the rest of the employees at A. B. C. will also have the opportunity to participate in one of your workshops.

Sincerely,

Sara D. Myrick, Director
Personnel Development

lej

GOODWILL LETTER

1. Promote goodwill
2. Expand the first paragraph
3. Reiterate goodwill

LETTER OF REQUEST

1. State the request
2. Explain the request
3. Motivate the reader to act
4. Close courteously

THE "YOU" ATTITUDE

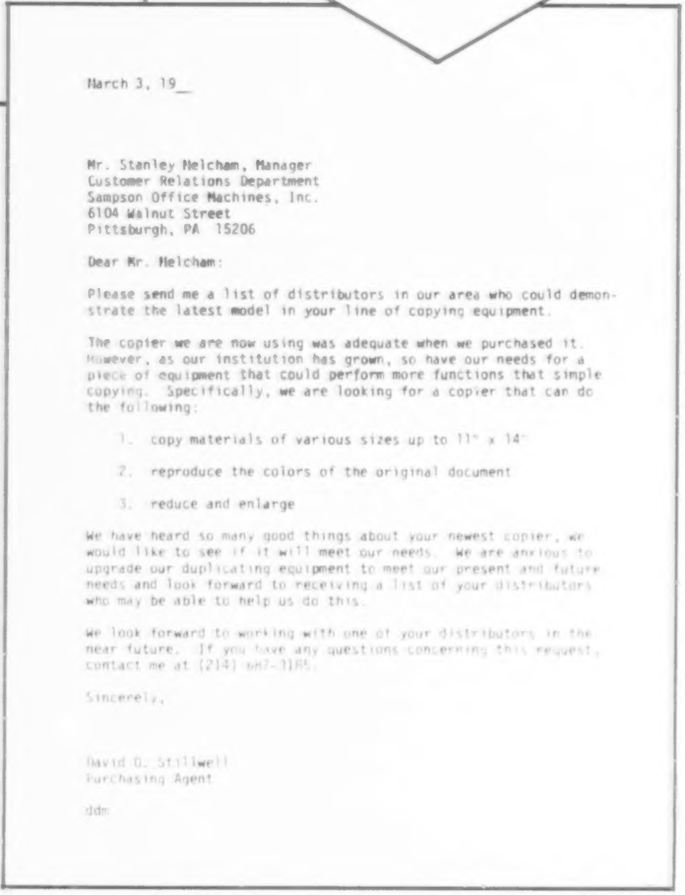
Keep in mind the reader's point of view

Put the reader's interest first.

Show how what you are trying to communicate in your letter will benefit the reader.

TRANSITIONAL ELEMENTS

Transitional elements are words, phrases, clauses, or even complete sentences that enable the writer to compose a message that "flows" from one thought to another. Repetition of key words also creates a link between two ideas.



March 3, 19__

Mr. Stanley Melcham, Manager
Customer Relations Department
Sampson Office Machines, Inc.
6104 Walnut Street
Pittsburgh, PA 15206

Dear Mr. Melcham:

Please send me a list of distributors in our area who could demonstrate the latest model in your line of copying equipment.

The copier we are now using was adequate when we purchased it. However, as our institution has grown, so have our needs for a piece of equipment that could perform more functions that simple copying. Specifically, we are looking for a copier that can do the following:

1. copy materials of various sizes up to 11" x 14"
2. reproduce the colors of the original document
3. reduce and enlarge

We have heard so many good things about your newest copier, we would like to see if it will meet our needs. We are anxious to upgrade our duplicating equipment to meet our present and future needs and look forward to receiving a list of your distributors who may be able to help us do this.

We look forward to working with one of your distributors in the near future. If you have any questions concerning this request, contact me at (214) 687-3185.

Sincerely,

David D. Stillwell
Purchasing Agent

ddm

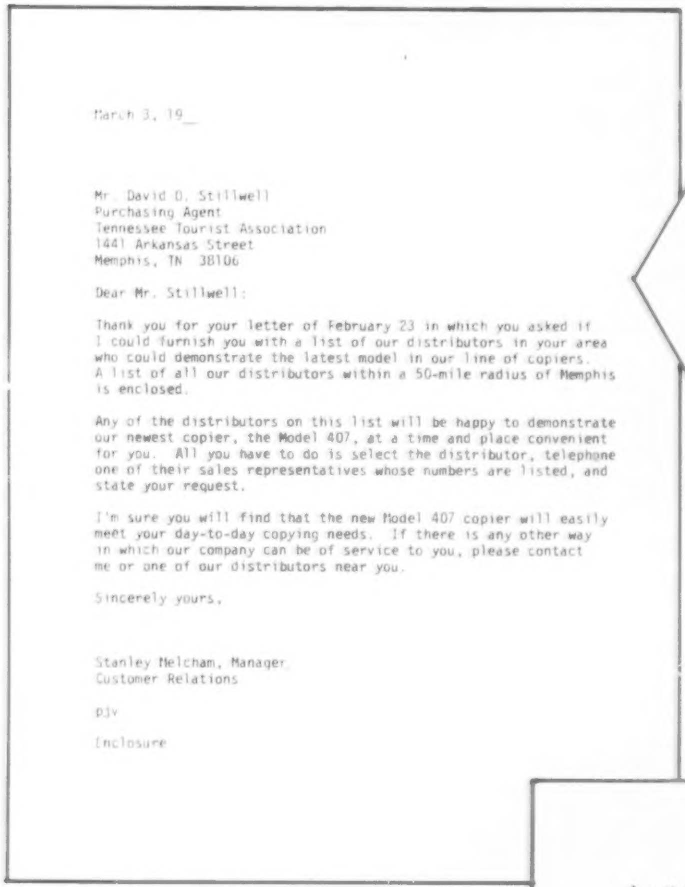
BEST COPY AVAILABLE

BEST COPY AVAILABLE

WRITING BUSINESS LETTERS

POSITIVE RESPONSE

1. Restate the request and say "yes"
2. Give any pertinent information
3. Close with an expression of goodwill



March 3, 19__

Mr. David D. Stillwell
Purchasing Agent
Tennessee Tourist Association
1441 Arkansas Street
Memphis, TN 38106

Dear Mr. Stillwell:

Thank you for your letter of February 23 in which you asked if I could furnish you with a list of our distributors in your area who could demonstrate the latest model in our line of copiers. A list of all our distributors within a 50-mile radius of Memphis is enclosed.

Any of the distributors on this list will be happy to demonstrate our newest copier, the Model 407, at a time and place convenient for you. All you have to do is select the distributor, telephone one of their sales representatives whose numbers are listed, and state your request.

I'm sure you will find that the new Model 407 copier will easily meet your day-to-day copying needs. If there is any other way in which our company can be of service to you, please contact me or one of our distributors near you.

Sincerely yours,

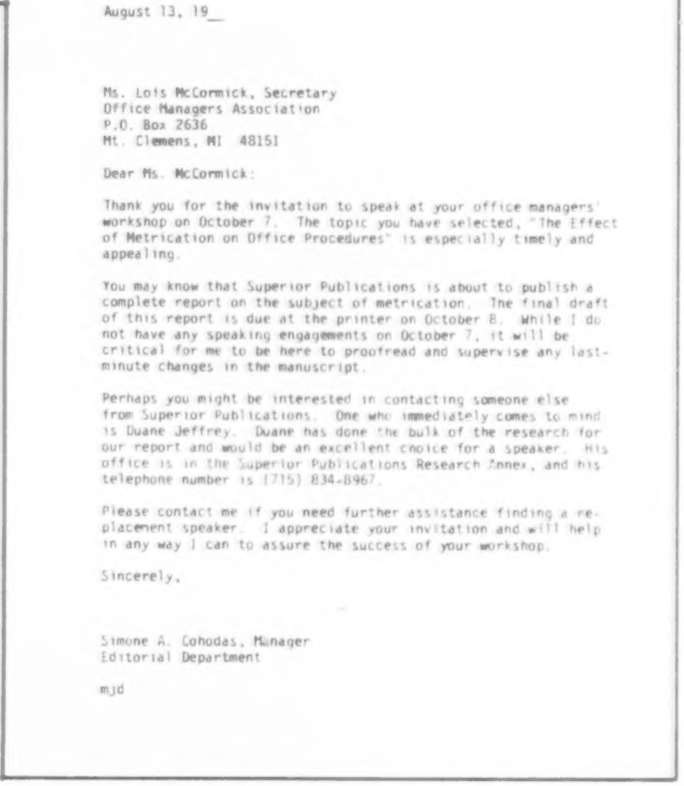
Stanley Melcham, Manager
Customer Relations

pjv

Enclosure

NEGATIVE RESPONSE

1. Express goodwill
2. Say "no" and explain the refusal
3. Offer an alternative
4. Close with goodwill



August 13, 19__

Ms. Lois McCormick, Secretary
Office Managers Association
P.O. Box 2636
Mt. Clemens, MI 48151

Dear Ms. McCormick:

Thank you for the invitation to speak at your office managers' workshop on October 7. The topic you have selected, "The Effect of Metrication on Office Procedures" is especially timely and appealing.

You may know that Superior Publications is about to publish a complete report on the subject of metrication. The final draft of this report is due at the printer on October 8. While I do not have any speaking engagements on October 7, it will be critical for me to be here to proofread and supervise any last-minute changes in the manuscript.

Perhaps you might be interested in contacting someone else from Superior Publications. One who immediately comes to mind is Duane Jeffrey. Duane has done the bulk of the research for our report and would be an excellent choice for a speaker. His office is in the Superior Publications Research Annex, and his telephone number is (715) 834-8967.

Please contact me if you need further assistance finding a replacement speaker. I appreciate your invitation and will help in any way I can to assure the success of your workshop.

Sincerely,

Simone A. Cohodas, Manager
Editorial Department

mjd

HINTS FOR WRITING BUSINESS LETTERS

1. PLAN AHEAD. Know what you want to say before you begin to write.
2. BE CONCISE. The skilled writer knows how to write sentences and paragraphs that give complete information without being **"wordy."**
3. USE TRANSTIONS. Any message you write should **"flow"** smoothly.
4. RELY ON THE "YOU" ATTITUDE. Keep the reader in mind at all times. After you have composed a message, reread it to see if it emphasizes the advantages to the reader rather than the benefit to the writer.
5. EMPHASIZE THE POSITIVE. In everything that you write, use positive language. Point out to the reader what can be done rather than what cannot be done.
6. CONVERSE WITH THE READER. Whenever you write a letter, picture the reader, then write as if you were speaking directly to the reader.
7. VARY SENTENCE STRUCTURE. Use a variety of sentence structures in each message, as a means of maintaining the reader's interest.
8. KEEP PARAGRAPHS SHORT. The purpose of any paragraph can usually be accomplished in one to five sentences.
9. MAINTAIN GOODWILL. Never be short or sarcastic in your writing.
10. ASSURE CORRECTNESS. After a piece of correspondence has been written and typed, proofread it carefully.

LETTER of GOODWILL

August 1, 19--

Mr. Walter K. Shivers
President
Shivers Training Corporation
5701 North Hills Drive
Fort Worth, TX 76104

Dear Mr. Shivers:

Thank you for conducting the interpersonal relationship workshop for the A.B.C. Company employees on Wednesday, July 23.

Everyone here at A.B.C. is still talking about the things they learned and about how the workshop helped them improve their own interpersonal relationships. Many of the employees who participated in the workshop have tried the techniques you demonstrated and, as a result, are finding themselves able to work more comfortably with the people around them. This increase in cooperation has helped to improve employee morale. The cooperation and high morale have both helped to increase productivity, just as you predicted.

All of us who attended the workshop feel very fortunate to have had this experience. We hope that in the near future the rest of the employees at A.B.C. will also have the opportunity to participate in one of your workshops.

Sincerely yours,

Amanda Alvarez
Director of Personnel

eb

LETTER of REQUEST

November 24, 19--

Mr. John Stafford
Sales Director
Office Machines, Inc.
3225 South Main Street
Dallas, TX 75203

Dear Mr. Stafford:

Please send me a list of distributors in our area who could demonstrate the latest model in your line of copying equipment.

The copier we are now using was adequate when we purchased it. However, as our company has grown, so have our needs for a piece of equipment that could perform more functions than simple copying. Specifically, we are looking for a copier that can do the following:

1. copy materials of various sizes up to 11" x 14"
2. reproduce the colors of the original document
3. reduce and enlarge

We have heard so many good things about your newest copier, we would like to see if it will meet our needs. We are anxious to upgrade our duplicating equipment to meet our present and future needs and look forward to receiving a list of your distributors who may be able to help us do this.

We look forward to working with one of your distributors in the near future. If you have any questions concerning this request, contact me at 817-286-7629.

Sincerely yours,

Nancy E. Farrow
Office Manager

eb

LETTER of POSITIVE RESPONSE

November 29, 19--

Ms. Nancy E. Farrow
Office Manager
FSM Corporation
6201 North 42nd Street
Waco, TX 76703

Dear Ms. Farrow:

Thank you for your letter of November 24 in which you asked if I could furnish you with a list of our distributors in your area who could demonstrate the latest model in our line of copiers. A list of all of our distributors within a 75-mile radius of Waco is enclosed.

Any of the distributors on this list will be happy to demonstrate our newest copier, the Model 407, at a time and place convenient for you. All you have to do is select the distributor, telephone one of their sales representatives whose numbers are listed, and state your request.

I'm sure you will find that the new Model 407 copier will easily meet your day-to-day copying needs. If there is any other way in which our company can be of service to you, please contact me or one of our distributors near you.

Sincerely yours,

John Stafford
Sales Director

eb

Enc. 1

LETTER of NEGATIVE RESPONSE

August 21, 19--

Ms. Crystal Walthall
Personnel Director
Yeats Corporation
University Plaza
420 South Freeway
San Antonio, TX 78218

Dear Ms. Walthall:

Thank you for the invitation to speak at your office managers workshop on October 7. The topic you have selected, "The Effect of Metrication on Office Procedures," is especially timely and appealing.

You may know that Superior Publications is about to publish a complete report on the subject of metrication. The final draft of this report is due at the printer on October 8. While I do not have any speaking engagements on October 7, it will be critical for me to be here to proofread and supervise any last-minute changes in the manuscript.

Perhaps you might be interested in contacting someone else from Superior Publications. One who immediately comes to mind is Duane Jeffrey. Duane has done the bulk of the research for our report and would be an excellent choice for a speaker. His office is in the Superior Publications Research Annex, and his phone number is 715-834-8967.

Please contact me if you need further assistance finding a replacement speaker. I appreciate your invitation and will help in any way I can to assure the success of your workshop.

Sincerely yours,

Susan Thornhill
Editor-in-Chief

eb

BUSINESS MATH

75.89(a)(2)(a) OFFICE EDUCATION ESSENTIAL ELEMENT
FINANCIAL RESPONSIBILITIES

Demonstrate the ability to add, subtract, multiply, and divide whole numbers, fractions, and numbers containing decimals

BUSINESS MATH

UNIT OBJECTIVE

The student will be able to add, subtract, multiply, and divide whole numbers, fractions, and numbers containing decimals. This knowledge will be evidenced through demonstration and by successfully completing the unit test.

SPECIFIC OBJECTIVES

1. Demonstrate the ability to:
    a. Add, subtract, multiply, and divide whole numbers, numbers with decimals, fractions, and percents.
    b. Work with fractions, decimals, and percentages.
    c. Round off numbers
2. Complete the statements regarding decimals and fractions.
3. Describe how percents are changed to fractions.
4. State the procedures for changing fractions to percents.
5. Explain how to change percents to decimals and decimals to percents.
6. List the steps for finding a percent of a given number.

TEACHER ACTIVITIES

1. Preview the unit. Add activities and objectives needed to meet the needs of the students.
2. Show audiovisual, "Math Skills for the Office," which can be ordered from the OCL.
3. Discuss information given in unit overview.
4. Discuss exact procedures for addition, subtraction, multiplication, and division.
5. Discuss procedures for working with fractions, decimals, and percents.
6. Illustrate the discussion with the chalkboard and overhead projector.
7. Assign activities from OCL Financial Responsibilities or from other resources listed on back of this page.

STUDENT ACTIVITIES

1. Know the procedures for addition, subtraction, multiplication, and division.
2. Know the procedures for computing fractions, decimals, and percentages.
3. Demonstrate knowledge of math transactions by completing worksheets and activities.

EVALUATION Unit Test

ESTIMATED COMPLETION TIME– 3-6 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section

RESOURCES

APPLIED BUSINESS MATHEMATICS
South-Western Publishing Co.

ARITHMETIC SKILLS WORKBOOK
AMSCO School Publications, Inc.

BASIC MATH REVIEW
text, workbook
South-Western Publishing Co.

BUSINESS MATH/30
McGraw-Hill Book Company

BUSINESS MATHEMATICS
slides, filmstrip, cassette, practice sheets, and teacher's guide
units can be ordered separately
Career Aids, Inc.

BUSINESS MATHEMATICS FOR THE CONSUMER
text
Glencoe Publishing Co.

CONSUMER AND BUSINESS ARITHMETIC
workbook and tests
Glencoe Publishing Co.

CONSUMER MATH
textbook and workbook

CONSUMER MATHEMATICS
Glencoe Publishing Co.

MATHEMATICS FOR THE CONSUMER
South-Western Publishing Co.

PROGRAMMED BUSINESS MATHEMATICS
McGraw-Hill Book Company

75.89(a)(2)(A)

OBJECTIVE: The student will be albe to add, subtract, multiply, and divide whole numbers, fractions, and numbers containing decimals. This knowledge will be evidenced through demonstration and by successfully completing the unit test.

	MASTERY	NON MASTERY
1. Demonstrate the ability to:		
a. Add, subtract, multiply, and divide whole numbers, numbers with decimals, fractions, and percents.		
b. Work with fractions, decimals, and percentages.		
c. Round off numbers		
2. Complete the statements regarding decimals and fractions.		
3. Describe how percents are changed to fractions.		
4. State the procedures for changing fractions to percents.		
5. Explain how to change percents to decimals and decimals to percents.		
6. List the steps for finding a percent of a given number.		

PERFORMANCE CHART

I. GENERAL INFORMATION

This unit is intended to be a review of routine business math procedures. Actual math applications and transactions used in the office will be covered in more detail in the units on financial responsibilities, working procedures, and the electronic calculator.

Most of the problems computed in business are done by using calculators and computers, but basic knowledge of math is needed in working with decimals, fractions, percentages, and rounded-off numbers.

The microcomputer is an excellent tool for teaching and reinforcing math procedures if the software is available.

II. OBJECTIVE SHEET

A. Discuss the unit and specific objectives with the student.

B. Add any objectives necessary to meet fully the needs of the unit and the students.

III. UNIT OVERVIEW

A. Terms and definitions

1. Discuss the terms and definitions.
2. Illustrate the discussion using the chalkboard or an overhead projector.
3. Have students complete activities from OCL Financial Responsibilities publication.

B. Working with whole numbers

1. Discuss the procedures for adding, subtracting, multiplying, and dividing whole numbers.
2. Demonstrate each of the procedures.
3. Have students complete activities from OCL Financial Responsibilities publication to reinforce information studied.

C. Working with decimals

1. Explain the procedures for working with decimals. Demonstrate the procedures as they are discussed.
2. Give examples for each of the procedures.
3. Have students complete activities from OCL Financial Responsibilities publication to reinforce information studied.

D. Working with fractions

1. Discuss the procedures and demonstrate with examples.
2. Have students complete activities from OCL Financial Responsibilities publication.

E. Computing percentages

1. Explain the procedures for working with percents and computing percentages.
2. Demonstrate each procedure as it is being discussed.
3. Have students complete OCL Financial Responsibilities activities or other exercises to reinforce information studied.

IV. UNIT TEST

A. Should cover the information presented in the unit overview.

B. Various methods of administering the test may be used:

  1. Use as an additional activity.
  2. Administer the test upon completion of the unit.
  3. Use as a daily quiz upon completion of the information.

C. Add test parts that correspond to any information added to the unit.

TERMS AND DEFINITIONS

I. ADDITION--combining the values of two or more numbers to form a larger number

- A. Addend--the numbers added together
- B. Sum--the total or answer that results from adding the numbers together

$$\begin{array}{rl} 30 & \text{addend} \\ +\ 5 & \\ \hline 35 & \text{sum} \end{array}$$

II. SUBTRACTION--the process of taking a smaller number away from a larger number

- A. Minuend--the larger number in the subtraction problem
- B. Subtrahend--the smaller number that is subtracted from the minuend
- C. Difference--the answer that results from the subtraction

$$\begin{array}{rl} 30 & \text{minuend} \\ -\ 5 & \text{subtrahend} \\ \hline 25 & \text{difference} \end{array}$$

III. MULTIPLICATION--the process of adding groups of numbers a specified number of times

- A. Multiplicand--the number being multiplied, usually the top or first number
- B. Multiplier--the number by which you multiply, usually the bottom or second number
- C. Product--the answer to the computation

$$\begin{array}{rl} 30 & \text{multiplicand} \\ \times\ \ 6 & \text{multiplier} \\ \hline 180 & \text{product} \end{array}$$

IV. DIVISION--the process of breaking any number into smaller groups of numbers

- A. Dividend--the number being divided
- B. Divisor--the number by which you divide
- C. Quotient--the answer obtained by dividing
- D. Remainder--the amount left over if the quotient is not a whole number

divisor quotient

26 ÷ 4 = 6 1/2

dividend remainder

V. FRACTION--a part of a unit or a number

- A. Numerator--the top number that indicates how many parts are represented
- B. Denominator--the bottom number that indicates how many equal parts have been divided
- C. Fraction bar--a line that separates the numerator and the denominator

fraction bar $\frac{1}{2}$ numerator denominator

- D. Types of fractions
  1. Proper fraction--numerator smaller than the denominator
  2. Improper fraction--numerator is as large or greater than the denominator, such as 50/3
  3. Mixed number--composed of a whole number and a fraction, such as 2 1/2
  4. Complex fraction--contains a fraction in the numerator and/or the denominator, such as $\frac{1/4}{6}$ or $\frac{1/5}{1/6}$
  5. Equivalent fractions--fractions with the same value, 1/2 or 4/8.
  6. Higher equivalent--fraction with the larger numerator and denominator 4/8.

WORKING WITH DECIMALS

I. MULTIPLICATION

- A. Multiply numbers in problem.

$$\begin{array}{r} 1.25 \\ \times\ \ .05 \\ \hline 625 \end{array}$$

- B. Count number of decimal places to the right of the decimal point(s) in the minuend and multiplier.

$$\begin{array}{rl} 1.25 & 2 \text{ decimal places} \\ \times\ \ .05 & \underline{2} \text{ decimal places} \\ \hline 625 & 4 \end{array}$$

- C. Move from right to left in the answer and count as many decimal places in the answer as there are in the problem.

D. Insert the decimal point.

$$\begin{array}{r} 1.25 \\ \times\ \ .05 \\ \hline .0625 \end{array}$$

(NOTE: Add zeros in the answer if necessary.)

$$\begin{array}{r} .05 \\ \times\ \ .5 \\ \hline .025 \end{array}$$

II. DIVISION

A. Decimal in the dividend only

$$5\overline{)2.5}$$

1. Place the decimal point in the quotient directly above the decimal in the dividend.

$$\begin{array}{r} . \\ 5\overline{)2.5} \end{array}$$

2. Divide the numbers.

$$\begin{array}{r} .5 \\ 5\overline{)2.5} \\ \underline{2\ 5} \end{array}$$

B. Decimal in the divisor

1. Move the decimal point in the divisor to the right until it is outside the number.

$$2.5\overline{)1625}$$

2. Move the decimal point in the dividend to the right the same number of places.

(NOTE: There is a decimal point at the end of the last digit in a whole number.)

3. Place a zero in any empty space.

$$2.5\overline{)1625.0}$$

4. Divide and place the decimal point in the quotient directly above the decimal in the dividend.

$$\begin{array}{r} 2.5\overline{)16250.} \\ \underline{150} \\ 125 \\ \underline{125} \\ 0 \end{array}$$

III. ROUNDING OFF NUMBERS

A. Raise the digit you are rounding by 1 if the digit to the right of it is between 5 and 9.

1.587 = 1.59

B. Do not change the digit if the digit to the right of it is between 0 and 4.

1.234 = 1.23

WORKING WITH FRACTIONS

I. REDUCING FRACTIONS TO LOWEST TERMS

A. Use the largest single number that will divide into both the numerator and the denominator an even number of times.

B. Divide this number into the numerator and the denominator.

$$(6)\ \frac{6}{12} = \frac{1}{2}$$

C. If the fraction is composed of large numbers, follow these steps in determining the number to use in reducing the fraction:

$$\frac{48}{64}$$

1. Divide the numerator into the denominator

$$\begin{array}{r} 1 \\ 48\overline{)64} \\ \underline{48} \\ 16 \end{array}$$

2. Then divide the remainder into the original divisor (the numerator).

$$\begin{array}{r} 3 \\ 16\overline{)48} \\ \underline{48} \\ 0 \end{array}$$

3. Continue until there is no remainder.

4. Use the last divisor as the number to divide into the numerator and denominator to reduce the fraction.

$$\begin{matrix} 16 \\ 16 \end{matrix}\ \ \frac{14}{64} = \frac{3}{4}$$

(NOTE: Eliminate the zeros when reducing fractions.)

$$\frac{10}{100} = \frac{10}{100} = \frac{1}{10}$$

II. RAISING FRACTIONS TO HIGHER EQUIVALENTS

A. Multiply the numerator and denominator by the same number.

$\frac{1}{2} = \frac{1}{2} \times \frac{2}{2} = \frac{2}{4}$

B. If there is a denominator given, follow these steps:

Raise $\frac{7}{15}$ to 30ths

1. Divide the denominator of the fraction (15) into the given denominator (30).

   $\begin{array}{r} 2 \\ 15\overline{)\,30} \end{array}$

2. Multiply the numerator of the fraction by the answer in step 1 (2).

   7 x 2 = 14

3. Write the answer to step 2 (14) over the given denominator (30). This is the higher equivalent.

   $\frac{14}{30}$

III. COMPARING FRACTIONS FOR HIGHEST VALUE

Which fraction is larger?

$\frac{5}{9}$ or $\frac{13}{18}$

A. Change the fractions to equivalent fractions that have the same denominator.

$\frac{5}{9} = \frac{10}{18}$

B. Compare the numerator. The one with the largest numerator has the largest value.

$\frac{10}{18}$ or $\frac{13}{18}$ $\frac{13}{18}$ is larger

IV. CHANGING IMPROPER FRACTIONS AND MIXED NUMBERS

A. To change improper fractions to mixed numbers, divide the numerator by the denominator.

$\frac{57}{12} =$ $\begin{array}{r} 4\frac{3}{4} \\ 12\overline{)\,57} \\ 48 \\ \underline{\;9\;} \\ 12 \end{array}$

$\frac{57}{12} = 4\frac{3}{4}$

B. To change mixed numbers to improper fractions:

$2\frac{3}{4}$

1. Multiply the denominator by the whole number.

   2 x 4 = 8

2. Add the numerator.

   8 + 3 = 11

3. Write the numerator over the denominator. $\frac{11}{4}$

V. ADDING FRACTIONS

A. With the same denominator

1. Add the numerators.

   $\frac{4}{11} + \frac{5}{11} =$

2. Write the sum of the numerators over the denominator

   4 + 5 = 9 $\frac{9}{11}$

B. With an improper fraction as the sum

1. Add the numerators.

   $\frac{3}{5} + \frac{3}{5} =$

2. Write the sum of the numerators over the denominator.

   3 + 3 = 6 $\frac{6}{5}$

3. Change the improper fraction to a mixed number.

   $5\overline{)\,6} = 1\frac{1}{6}$

C. With different denominators

1. Find the smallest common (same) denominator into which all the unlike denominators will divide.

   $\frac{1}{2} + \frac{2}{3} + \frac{3}{4} =$

   12 common denominator

2. Divide each unlike denominator into the common denominator.

   $\begin{array}{r} 6 \\ 2\overline{)\,12} \end{array}$ $\begin{array}{r} 4 \\ 3\overline{)\,12} \end{array}$ $\begin{array}{r} 3 \\ 4\overline{)\,12} \end{array}$

3. Multiply each answer by its respective numerator.

   $\frac{1}{2} \times 6 = 6$ $\frac{2}{3} \times 4 = 8$

   $\frac{3}{4} \times 3 = 9$ New Numerators

4. Place the new numerators over the common denominator.

   $\frac{6}{12} + \frac{8}{12} + \frac{9}{12}$ Equivalent Fractions

5. Add the top numbers (numerators).

   $\frac{6}{12} + \frac{8}{12} + \frac{9}{12} = \frac{23}{12}$

   answer is an improper fraction

6. Change the improper fraction to a mixed number.

   $\frac{23}{12} = 1\frac{11}{12}$ answer in mixed number

D. With mixed numbers

1. Add the whole numbers.

2. Add the fractions.

   a. Change unlike denominaors to a common denominator.

   b. Change improper fraction to mixed number.

$$\begin{array}{rcl} 8\frac{3}{4} & = & \frac{6}{8} \\ +\ 5\frac{3}{8} & = & \frac{3}{8} \\ +\ 4\frac{1}{2} & = & \frac{4}{8} \\ \hline 17 & & \frac{13}{8} = 1\frac{5}{8} \end{array}$$

3. Combine the two answers for a final total.

   $17 + 1\frac{5}{8} = 18\frac{5}{8}$ answer

VI. SUBTRACTING FRACTIONS

A. With unlike denominators

1. Arrange fractions one under another.

$$\begin{array}{r} \frac{2}{3} \\ -\ \frac{3}{5} \\ \hline \end{array}$$

2. Find the common denominator.

3. Subtract the numerators.

4. Place the answer over the common denominator.

$$\begin{array}{rcr} \frac{2}{3} & = & \frac{10}{15} \\ -\ \frac{3}{5} & = & \frac{9}{15} \\ \hline & & \frac{1}{15} \end{array}$$

B. With mixed numbers

1. Arrange mixed numbers one under another.

$$\begin{array}{r} 13\ \frac{2}{3} \\ -\ 6\ \frac{3}{8} \\ \hline \end{array}$$

2. Determine the common denominators (24).

3. Subtract the fractions first, then subtract the whole numbers.

$$\begin{array}{r} 13\ \frac{16}{24} \\ -\ 6\ \frac{9}{24} \\ \hline 7\ \frac{7}{24} \end{array}$$

(NOTE: If the fraction in the subtrahend is larger than the fraction in the minuend, borrow one (1) from the whole number in the minuend (7) and add to the fraction ($1\frac{4}{20}$). Change the mixed fraction ($1\frac{4}{20}$) to an improper fraction ($\frac{24}{20}$) and subtract.)

$$\begin{array}{r} 6\ \frac{24}{20} \\ -\ 3\ \frac{15}{20} \\ \hline 3\ \frac{9}{20} \end{array} \quad \left(1\frac{4}{20} = \frac{24}{20}\right)$$

VII. MULTIPLYING

A. Common fractions

1. Multiply the numerators.

2. Multiply the denominators.

   $\frac{1}{5} \times \frac{2}{3} = \frac{2}{15}$

COMPUTING PERCENTAGES

I. CHANGING PERCENTS TO DECIMALS

A. Move the decimal two places to the left.

(NOTE: The decimal is understood to be at the right of a whole number.)

B. Drop the percent sign.

2% = 02 = .02

II. CHANGING DECIMALS TO PERCENTS

A. Move the decimal two places to the right.

2.25 2.25

B. Add the percent sign.

225%

III. CHANGING PERCENTS TO FRACTIONS

A. Write the percent as a fraction with a denominator of 100.

$\frac{25}{100}$

B. Reduce to the lowest terms.

$\frac{25}{100} = \frac{1}{4}$

IV. CHANGING FRACTIONS TO PERCENTS

A. Divide the numerator by the denominator.

B. Carry the answer to three places.

```
          .375
3/8 = 8 ⌐3.000
         2 4
          60
          56
           40
           40
```

C. Change the decimal answer to a percent.

.375 = 37.5%

V. FINDING A PERCENT OF A GIVEN AMOUNT

A. Change the percent to a decimal.

B. Multiply the given amount by the decimal amount.

EXAMPLE: Find the amount of the commission on sales of $1,080 if the commission is 5%.

1. 5% = .05

2.
```
   $1,080
 x    .05
   $54.00
 Commission
```

EXAMPLE 2: Find the number of apples sold if 100 apples were purchased and 80% of them were sold.

1. 80% = .80

2.
```
  100
  x.80
  80.00 apples
     were sold
```

VI. FINDING AN AMOUNT WHEN THE PERCENT OF IT IS GIVEN

A. Change the percent to a decimal.

B. Divide the given amount by the decimal amount.

EXAMPLE: If a dress is reduced by 25% to sell for $20, what was the original price?

1. 25% = .25

2.
```
           $80
     .25 ⌐20.00
```

3. $80 original price

VII. FINDING THE PERCENT OF DECREASE OR INCREASE

A. To find the amount of decrease

1. Subtract the new figure from the original figure.
2. Write as a fraction.
    - a. The amount of decrease as the numerator.
    - b. The original figure as the denominator.

(NOTE: If possible, cancel cross factors before multiplying numerators and denominators.)

$$\frac{2}{5} \times \frac{5}{8} =$$

$$\frac{2}{5} \times \frac{5}{8} = \frac{1}{4}$$

3. Reduce product to its lowest terms.

B. Mixed numbers and whole numbers

1. Change the mixed numbers and the whole numbers to improper fractions.

$$2 \times 3\,\frac{1}{3} = 1\,\frac{2}{x}\;3 = \frac{10}{\ }$$

$$\frac{20}{3} = 6\,\frac{2}{3}$$

(NOTE: Cancel cross factors, if possible.)

2. Multiply across.

3. Change product to mixed numbers.

$$1\,\frac{1}{4} \times 2\,\frac{2}{3} = \frac{5}{4} \times \frac{8}{3} =$$

$$\frac{5}{4} \times \frac{8}{3} = \frac{10}{3} = 3\,\frac{1}{3}$$

VIII. DIVIDING

A. Common fractions

1. Change the ÷ symbol to an x symbol and invert the divisor.

$$\frac{1}{3} \div \frac{1}{6} = \frac{1}{3} \times \frac{6}{1}$$

2. Multiply.

(NOTE: Cancel cross factors if possible.)

$$\frac{1}{3} \times \frac{6}{1} = 2$$

B. Mixed and whole numbers

1. Change whole and mixed numbers to improper fractions.

$$3 \div 5\,\frac{1}{4} = \frac{3}{1} \div \frac{21}{4}$$

2. Change the ÷ symbol to an x symbol and invert the divisor.

$$\frac{3}{1} \times \frac{4}{21} =$$

3. Multiply.

(NOTE: Cancel cross factors if possible.)

$$\frac{3}{1} \times \frac{4}{21} = \frac{4}{7}$$

IX. SIMPLIFYING COMPLEX FRACTIONS

A. Rewrite the fraction as a division problem.

$$\frac{\frac{1}{4}}{\frac{3}{8}} = \frac{1}{4} \div \frac{3}{8} =$$

B. Change the ÷ symbol to an x symbol and invert the divisor.

$$\frac{1}{4} \times \frac{8}{3} =$$

C. Multiply.

(NOTE: Cancel cross factors if possible.)

$$\frac{1}{4} \times \frac{8}{3} = \frac{2}{3}$$

X. CHANGING FRACTIONS TO DECIMALS

A. Common fractions

1. Divide the numerator by the denominator.

2. Insert the decimal.

$$\frac{1}{4} = \begin{array}{r} .25 \\ 4\overline{)1.00} \\ \underline{8} \\ 20 \\ \underline{20} \end{array} \qquad \frac{1}{4} = .25$$

B. Mixed numbers

1. Change the fraction to a decimal.

2. Insert the decimal.

$$2\,\frac{1}{4} \quad \begin{array}{r} .25 \\ 4\overline{)1.00} \\ \underline{8} \\ 20 \\ \underline{20} \end{array} \quad = 2.25$$

3. Change the fraction to a percent.

   EXAMPLE: A dress selling for $80 was reduced to $20. What is the percent of decrease?

   1. $$\begin{array}{r} \$80 \\ \underline{-\ \$20} \\ \$60 \end{array}$$

   2. 60/80 = 3/4

   3. $$\begin{array}{r} .75 \\ 4\overline{)3.00} \\ \underline{28} \\ 20 \\ \underline{20} \end{array}$$

   4. .75 = 75%, percent of decrease

B. To find the amount of increase

   1. Subtract the original figure from the new figure.

   2. Write as a fraction

      a. the amount of increase as the numerator

      b. the original amount as the denominator

   3. Change the fraction to a percent.

      EXAMPLE: If an amount is increased from 80 to 120, what is the percent of increase?

      1. $$\begin{array}{r} 120 \\ \underline{-\ \ 80} \\ 40 \end{array}$$

      2. 40/80 = 1/2

      3. $$\begin{array}{r} .5 \\ 2\overline{)1.0} \end{array}$$

      4. .5 = 50%, percent of increase

BANKING ACTIVITIES

75.89(a)(2)(b) OFFICE EDUCATION ESSENTIAL ELEMENT
FINANCIAL RESPONSIBILITIES

Maintain a checking account, including making deposits, writing checks, reconciling bank statements, and filing cancelled checks

BANKING ACTIVITIES

UNIT OBJECTIVE

The student will be able to maintain a checking account, including making deposits, writing checks, endorsing checks, reconciling bank statements, and filing canceled checks. This will be evidenced through demonstration and by successfully completing the unit test..

SPECIFIC OBJECTIVES

1. Match terms to their correct definitions.
2. Name and describe the three types of endorsements.
3. Describe the preparation and recording of a deposit slip.
4. Explain the procedure for writing and recording checks.
5. Discuss the process for reconciling a bank statement.
6. Describe the appropriate method of filing canceled checks and bank statements.
7. Demonstrate the ability to:
    a. Complete a deposit slip.
    b. Prepare checks.
    c. Record information in a check register.
    d. Reconcile a bank statement.

TEACHER ACTIVITIES

1. Duplicate forms for completing activities.
2. Design bulletin board introducing the unit.
3. Gather samples of deposit slips, checks, canceled checks, check registers, and bank statements to facilitate discussion.
4. Discuss objectives of unit with students.
5. Use overhead projector and transparencies to demonstrate use of forms during discussion.

STUDENT ACTIVITIES

1. Know terms and definitions related to banking.
2. Demonstrate making a deposit.
3. Demonstrate writing checks.
4. Demonstrate reconciling a bank statement.
5. Demonstrate automated banking procedures on microcomputer, if possible.

EVALUATION - UNIT TEST

ESTIMATED COMPLETION TIME – 5-10 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed fro the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

THE ADMINISTRATIVE SECRETARY
Gregg/McGraw-Hill Book Co.

BANK RECONCILIATION PROJECTS
Workbook
Glencoe Publishing Co.

BANKING AND CREDIT OCCUPATIONS
Prentice-Hall Media

BANKING--MICROCOMPUTER JOB SIMULATOR SERIES
1 disk, student manual and documents needed
Apple II or IIe
TRS-80 Model III

CENTURY 21 ACCOUNTING
South-Western Publishing C.

DEVELOPING BOOKKEEPING SKILLS
AMSCO School Publications, Inc.

GENERAL OFFICE PROCEDURES FOR COLLEGES, 7th ed.
South-Western Publishing Co.

HANDLING FINANCIAL RESPONSIBILITIES IN AN OFFICE
Audiovisual
Occupational Curriculum Laboratory

OFFICE PROCEDURES, 2nd ed.
MPC Educational Publishers, Milady Publishing Corp.

SECRETARIAL OFFICE PROCEDURES, COLLEGE SERIES
Gregg/McGraw-Hill Book Co.

SECRETARIAL OFFICE PROCEDURES FOR COLLEGES, 7th ed.
South-Western Publishing Co.

SECURITY FIRST BANK--A BANKING CUSTOMER SIMULATION
South-Western Publishing Co.

SMALL BUSINESS MANAGEMENT
Delmar Publishers

STANDARD PAYROLL PROJECT
Workbook
Glencoe Publishing Co.

75.89(a)(2)(B)

OBJECTIVE: The student will be able to maintain a checking account, including making deposits, writing checks, endorsing checks, reconciling bank statements, and filing canceled checks. This will be evidenced through demonstration and by successfully completing the unit test.

	MASTERY	NON MASTERY
1. Know terms and definitions related to banking.		
2. Demonstrate making a deposit.		
3. Demonstrate writing checks.		
4. Demonstrate reconciling a bank statement.		
5. Demonstrate automated banking procedures on microcomputer, if possible.		

PERFORMANCE CHART

I. GENERAL INFORMATION

A. Many techniques can be used to teach this unit.

1. Microcomputer software is available to teach automated banking.

2. Banking and Savings and Loan from OCL gives an in-depth study of all banking procedures.

II. PREPARATION FOR UNIT

A. Duplicate adequate number of forms for completing activities.

B. Design a bulletin board introducing the unit.

1. Include samples of deposit slips, checks, bank statements.

2. Illustrate how a check is cleared, from the time it is written to when it is returned with the bank statement.

C. Gather samples of deposit slips, checks, canceled checks, check registers, and bank statements to facilitate the discussion of the unit.

D. Add any information necessary to meet fully the needs of the unit and of the students.

III. UNIT OVERVIEW AND ACTIVITIES

A. Terms and definitions

1. Discuss the terms and definitions.

2. Provide any examples or illustrations to facilitate the discussion.

B. Making a deposit

1. Provide examples of money wrappers. Demonstrate how to wrap coins and bills.

2. Illustrate the three types of endorsements. Provide examples of when each should be used.

3. Provide sample deposit slips for use in describing how to prepare a deposit slip.

4. Demonstrate how to record a deposit on the check stub or in the check register.

5. Have students complete activities on preparing deposit slips.

C. Preparing checks

1. Provide samples of checks for use in describing how to write checks.

2. Provide samples of check registers and check stubs to illustrate how to record checks.

3. Demonstrate how to void a check.

4. Have students complete activities on preparing checks and recording checks and deposits in the check register.

D. Reconciling a bank statement

1. Provide an example of a bank statement and canceled checks to aid in the discussion.

2. Encourage students to observe and assist their parents in balancing their checkbooks and reconciling their bank statements.

3. Have students complete activities on reconciling a bank statement.

IV. UNIT TEST

A. Various methods of administering the test may be used:

1. Administer test upon completion of the unit.
2. Use test as an additional activity.

B. Add test parts to correspond to any information added to the unit.

I. TERMS AND DEFINITIONS

A. ABA numbers--American Bankers Association code numbers printed on checks and deposit slips

B. Bank statement--a printed record of all transactions that have taken place in the checking account during the month

C. Blank endorsement--an endorsement consisting solely of the signature of the person to whom the check is written

D. Canceled check--a check that has been paid by the bank. The check is then returned to the account holder with the bank statement

E. Check-writing machine--a machine used in writing checks that imprints the amount in a distinct type and perforates the paper to ensure against fraudulent alteration of the check

F. Clearing a check--the process that takes place from the time the check is deposited until it is paid

G. Deposit--money put into a bank account

H. Deposits in transit--deposits that were recorded on the account holder's check register or stub, but were not processed at the bank in time to be included on the bank statement

I. Deposit slip--a form the depositor fills out showing the amounts and types of money to be deposited in a bank account

J. Endorsement in full--an endorsement used for transferring a check to another person or company

K. Outstanding checks--checks which have been written and recorded on the register or check stub but which have not cleared the bank in time to be included on the bank statement

L. Reconciling a bank statement--another way of saying "balancing the checkbook." Process of getting the checkbook balance and the bank's balance to match

M. Restrictive endorsement--an endorsement which restricts the use of the check once it is endorsed. Insures that the check can be deposited only to the account of the person or company whose identification appears in the endorsement

N. Voiding a check--tearing up a check that has been written incorrectly

II. MAKING A DEPOSIT

A. Preparing cash for deposit

  1. Obtain money wrappers for both coins and bills from the bank.

    a. Coin wrappers

      (1) Sort coins into stacks of pennies, nickels, etc.

      (2) Stack the number of coins in a coin wrapper that will equal the amount shown on the outside of the wrapper.

      (3) Write or stamp the name of the depositor on each roll for identification in case of an error.

    b. Bill wrappers

      (1) Lay each bill of like denomination face up, with the picture on each bill facing the same direction.

      (2) Count out the number of bills that equals the amount printed on the wrapper.

      (3) Place money wrapper tightly around the bills.

      (4) Print the name of the person or company holding the account on the outside of the money wrapper.

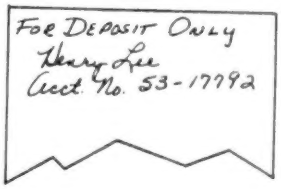
2. Extra bills of each denomination that cannot be placed in a wrapper should be laid down in the same manner as those that were wrapped. All extra bills should be stacked together, with bills of smallest denomination on top, largest denomination on bottom.

3. All bills, wrapped and loose, should be bound together with an elastic band.

B. Preparing checks for deposit

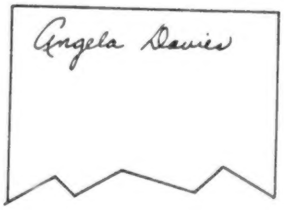
1. Inspect each check to ensure that it has been written correctly.
    a. Check has been made payable to the proper person or firm
    b. Amount written in figures agrees with that spelled in words
    c. Check has been signed

2. Endorse the check.
    a. Checks must be endorsed in order to be deposited.
        (1) Endorsements may be made with a stamp or manually.
        (2) Endorsement is stamped or written on the left end of the backside of the check (bottom side down).
    b. Types of endorsements
        (1) Restrictive endorsement
            (a) The words "For Deposit Only" written or printed on the first line of the endorsement.



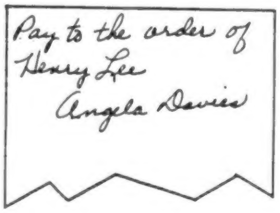
FOR DEPOSIT ONLY
Henry Lee
Acct. No. 53-17792

            (b) Signature and /or account number of the person or company that has the account into which the check is being deposited entered on lines two and three.



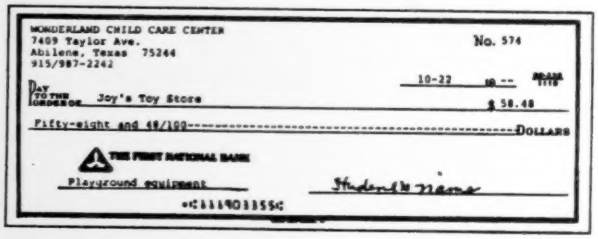
Angela Davies

        (2) Blank endorsement
            (a) Endorser's name signed on the back of the check.
            (b) Check is payable to anyone who tries to cash it.
            (c) Endorsement would be used only when one is at the bank where the check is to be cashed or deposited.



Pay to the order of
Henry Lee
Angela Davies

        (3) Endorsement in full
            (a) The words "Pay to the order of" are written or printed on the first line of the endorsement.
            (b) The name of the person or company to whom the check is given is on line two.
            (c) The signature of the person to whom the check is made payable or the signature of the person authorized to use the account is entered on the third line.



WONDERLAND CHILD CARE CENTER
7409 Taylor Ave.
Abilene, Texas 75244
915/987-2242

No. 574

10-22 19 --

PAY TO THE ORDER OF Joy's Toy Store $ 58.48

Fifty-eight and 48/100--DOLLARS

THE FIRST NATIONAL BANK

Playground equipment

Student's name

•:111903355:

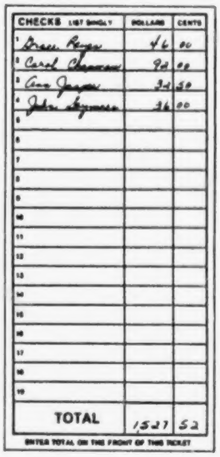
BEST COPY AVAILABLE

C. Preparing the deposit slip

1. Record the account number.
    a. Use personalized deposit slips with the account number printed on the slip, if available.
    b. Record the account number in the appropriate spaces if using a general deposit slip provided at the bank.
2. Always use the current date.
3. Record the currency to be deposited.
    a. List the total amount of the bills being deposited.
    b. List dollars to the left of the vertical line, with zeros in the column allotted for cents.
4. List the total amount of the coins being deposited, in dollars and cents.
5. List each check separately.
    a. Record either the ABA number on the check or the name of the person or company that wrote the check.
    b. Record the exact amount of the check in dollars and cents.
    c. List additional checks on the back of the deposit slip.
6. Record the total amount of the currency, coins, and checks, being deposited.
7. Deduct cash received.
    a. List the amount of any cash to be received in the "less cash received" column.
    b. Subtract the amount from the total amount of the deposit.
    c. Record the adjusted total of the deposit below the cash amount. This is the actual amount of the deposit.

(NOTE: The depositor must sign the deposit slip in the space provided, if cash is to be received.)

8. Record the date and the amount of the deposit in the check register or on the check stub. Adjust the checkbook balance.



CHECKS LIST SINGLY	DOLLARS	CENTS
1 Grace Reyes	46	00
2 Carol Chapman	92	00
3 Ann Jasper	34	50
4 John Seymour	36	00
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
TOTAL	1527	52

ENTER TOTAL ON THE FRONT OF THIS TICKET

III. PREPARING CHECKS

(NOTE: Checks may be handwritten, typed on the typewriter, or prepared on a special check writing machine.)

A. Steps for writing checks

1. Enter the check number, date, payee, and the extension figures in the check register or on the check stub. This provides a record of all checks written against the account and of all deposits made to the account.
2. If the checks are not prenumbered, enter the next consecutive number for the check in the appropriate space.
3. Record the current date in the space labeled "Date."
4. On the line labeled "Pay to the order of," record the name of the payee, the person or company to whom the check is being written. Double check the spelling of the payee's name before writing anything in the space.
5. At the end of that line, insert the amount of the check in figures.
    a. This amount can be written using figures for the dollar amount followed by a decimal point and the cents figure.
    b. This amount can be written using figures for the dollar amount and a fraction (cents over the number 100) for the cents figure.
    c. If the amount of the check is less than one dollar, circle the amount.

6. On the next blank line, insert the amount of the check by spelling out the dollar amount in words and by using a fraction for any additional cents.
    a. Begin at the extreme left of the space provided to prevent the insertion of additional words.
    b. Separate the dollar and the cents amounts by the word "and."
    c. If the check is for an even dollar amount, write 00/100 or no/100 for the cents amount.
    d. Draw a line from the fraction to "Dollars" to fill the empty space.
    e. If the amount of the check is less than one dollar, precede the fraction that indicates cents with the word "only," and cover over the word "Dollars" that appears at the end of the line.
    f. Check to be sure that the amount written in figures is the same as the amount written in words. If there is an error in the amount entered in figures, the amount shown in words is the amount for which the check will be cashed.
7. On the line in the lower left corner of the check, record the purpose for which the check is being written.
8. If the account number is not printed on the check, record that number in the appropriate spaces.
9. Sign the check on the line in the lower right corner.
    a. Sign your name exactly as it is shown on the signature card at the bank.
    b. Be sure that the signature is that of either the account holder (personal name) or a person authorized to write checks for a company.

B. Voiding a check
    1. Never erase or cross out a mistake on a check.
    2. Tear up the check and start a new one.
    3. Enter the check number and date in the register, and write VOID in the column that describes the transaction.

IV. RECONCILING A BANK STATEMENT

A. Information contained on the bank statement
    1. All checks and deposits that have been processed since the last statement
    2. The date the transaction was recorded at the bank
    3. The balance after each transaction
    4. Any service charges incurred
    5. A form on the back of the statement of aid in balancing the account

B. Steps in reconciling a bank statement
    1. Compare the amount shown on each canceled check with the amount shown on the bank statement.
        a. Do not change the order in which checks are returned by the bank. The order in which the canceled checks are returned with the bank statement will correspond to the order in which they are listed on the bank statement.
        b. Place a check mark next to each figure on the bank statement that matches the amount shown on the canceled check.
    2. Compare the deposits listed on the bank statement with those listed in the check register or on check stubs.
        a. Place check marks both on the bank statement and on the register or stub for each deposit.

   b. Make a list of all deposits that have been made but have not been credited to the account (deposits in transit).

3. Arrange the canceled checks in numeric order and compare them with the stubs or the register.

   a. Place a check mark next to each check listed in the register or on the stubs for which there is a canceled check.

   b. Make a list of all checks that have been written but have not yet been paid by the bank on this statement (outstanding checks). List the check number and the amount.

4. Balance the checkbook on the form provided by the bank or on plain paper by following the procedure below.

   a. Record the amount of the bank balance which is shown on the statement.

   b. Add any deposits which have been made but are not shown on the statement.

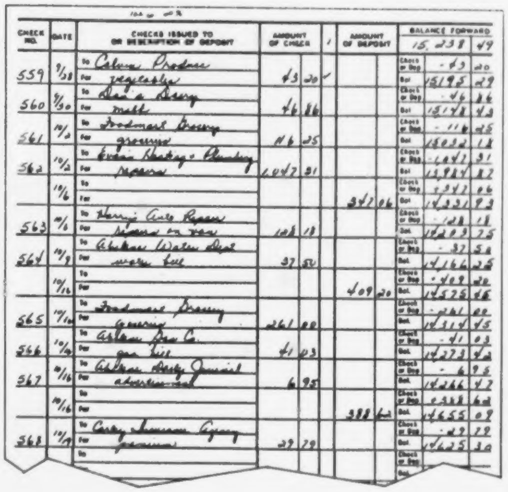
   c. Total the amounts of the outstanding checks and subtract this figure from the sum of the bank balance and uncredited deposits.

   d. Record the adjusted bank balance, the figure obtained in step (c) above. The adjusted bank balance should agree with the balance in the checkbook.

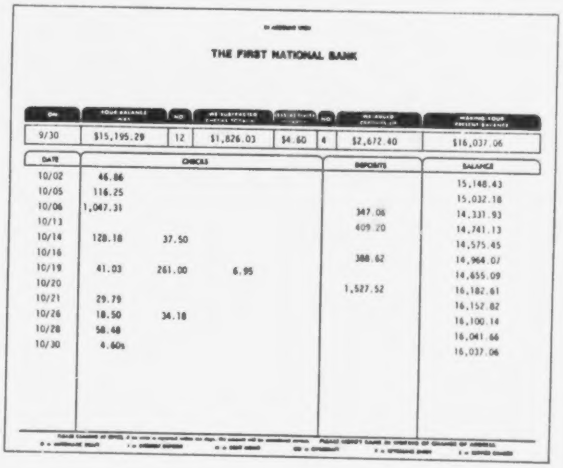
5. Double-check the adjusted bank balance.

   a. Record the balance shown in the checkbook.

   b. Subtract any activity or service charge noted on the bank statement.



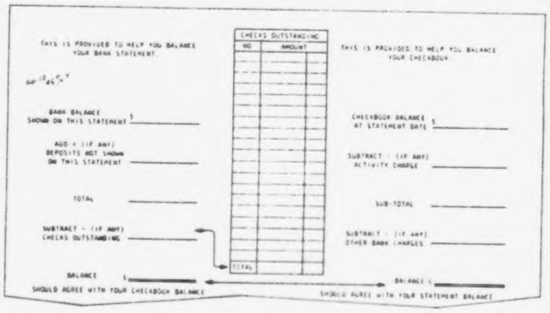
CHECK NO.	DATE	CHECKS ISSUED TO OR DESCRIPTION OF DEPOSIT	AMOUNT OF CHECK		✓	AMOUNT OF DEPOSIT		BALANCE FORWARD	15,238	49
559	9/28	To Calvin Produce						Check or Dep	-43	20
		For vegetables	43	20	✓			Bal	15195	29
560	9/30	To Dee's Dairy						Check or Dep	-46	86
		For milk	46	86				Bal	15148	43
561	10/2	To Foodmart Grocery						Check or Dep	-116	25
		For groceries	116	25				Bal	15032	18
562	10/2	To Evan Heating & Plumbing						Check or Dep	-1047	31
		For repairs	1,047	31				Bal	13,984	87
	10/6	To						Check or Dep	+347	06
		For				347	06	Bal	14331	93
563	10/6	To Harry's Auto Repair						Check or Dep	-128	18
		For repairs on van	128	18				Bal	14203	75
564	10/9	To Abilene Water Dept						Check or Dep	-37	50
		For water bill	37	50				Bal	14166	25
	10/12	To						Check or Dep	+409	20
		For				409	20	Bal	14575	45
565	10/14	To Foodmart Grocery						Check or Dep	-261	00
		For groceries	261	00				Bal	14314	45
566	10/14	To Ashton Gas Co.						Check or Dep	-41	03
		For gas bill	41	03				Bal	14273	42
567	10/16	To Abilene Daily Journal						Check or Dep	-6	95
		For advertisement	6	95				Bal	14266	47
	10/16	To						Check or Dep	+388	62
		For				388	62	Bal	14655	09
568	10/19	To Carey Insurance Agency						Check or Dep	-29	79
		For premium	29	79				Bal	14625	30
		To						Check or Dep		
								Bal		



THE FIRST NATIONAL BANK

ON	YOUR BALANCE WAS	NO	WE SUBTRACTED CHECKS TOTALING	LESS ACTIVITY CHARGE	NO	WE ADDED DEPOSITS OF	MAKING YOUR PRESENT BALANCE
9/30	$15,195.29	12	$1,826.03	$4.60	4	$2,672.40	$16,037.06

DATE	CHECKS			DEPOSITS	BALANCE
10/02	46.86				15,148.43
10/05	116.25				15,032.18
10/06	1,047.31			347.06	14,331.93
10/13				409.20	14,741.13
10/14	128.18	37.50			14,575.45
10/16				388.62	14,964.07
10/19	41.03	261.00	6.95		14,655.09
10/20				1,527.52	16,182.61
10/21	29.79				16,152.82
10/26	18.50	34.18			16,100.14
10/28	58.48				16,041.66
10/30	4.60s				16,037.06



THIS IS PROVIDED TO HELP YOU BALANCE YOUR BANK STATEMENT.

BANK BALANCE SHOWN ON THIS STATEMENT $ ______

ADD + (IF ANY) DEPOSITS NOT SHOWN ON THIS STATEMENT ______

TOTAL ______

SUBTRACT - (IF ANY) CHECKS OUTSTANDING ______

BALANCE $ ______

SHOULD AGREE WITH YOUR CHECKBOOK BALANCE

CHECKS OUTSTANDING	
NO	AMOUNT
TOTAL	

THIS IS PROVIDED TO HELP YOU BALANCE YOUR CHECKBOOK.

CHECKBOOK BALANCE AT STATEMENT DATE $ ______

SUBTRACT - (IF ANY) ACTIVITY CHARGE ______

SUB-TOTAL ______

SUBTRACT - (IF ANY) OTHER BANK CHARGES ______

BALANCE $ ______

SHOULD AGREE WITH YOUR STATEMENT BALANCE

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c. After subtotaling the checkbook balance minus any activity charge, subtract any additional bank charges for such items as new checks and stop payment orders from that figure.

6. Compare the figures found after following this process. If the checkbook is "balanced," the figures will be the same. The last figure recorded in the checkbook will also match these two figures.

C. Finding balancing errors

1. Has the amount of each check on the checkbook stubs or in the check register been entered correctly?

2. Are the amounts of the deposits entered on the checkbook stubs or in the register the same as those shown on the statement?

3. Have all checks been deducted from the check stubs or from the register?

4. Have all bank charges been deducted from the check stubs or from the register?

5. Has the correct balance been carried forward from one checkbook stub to another or from one page in the register to another?

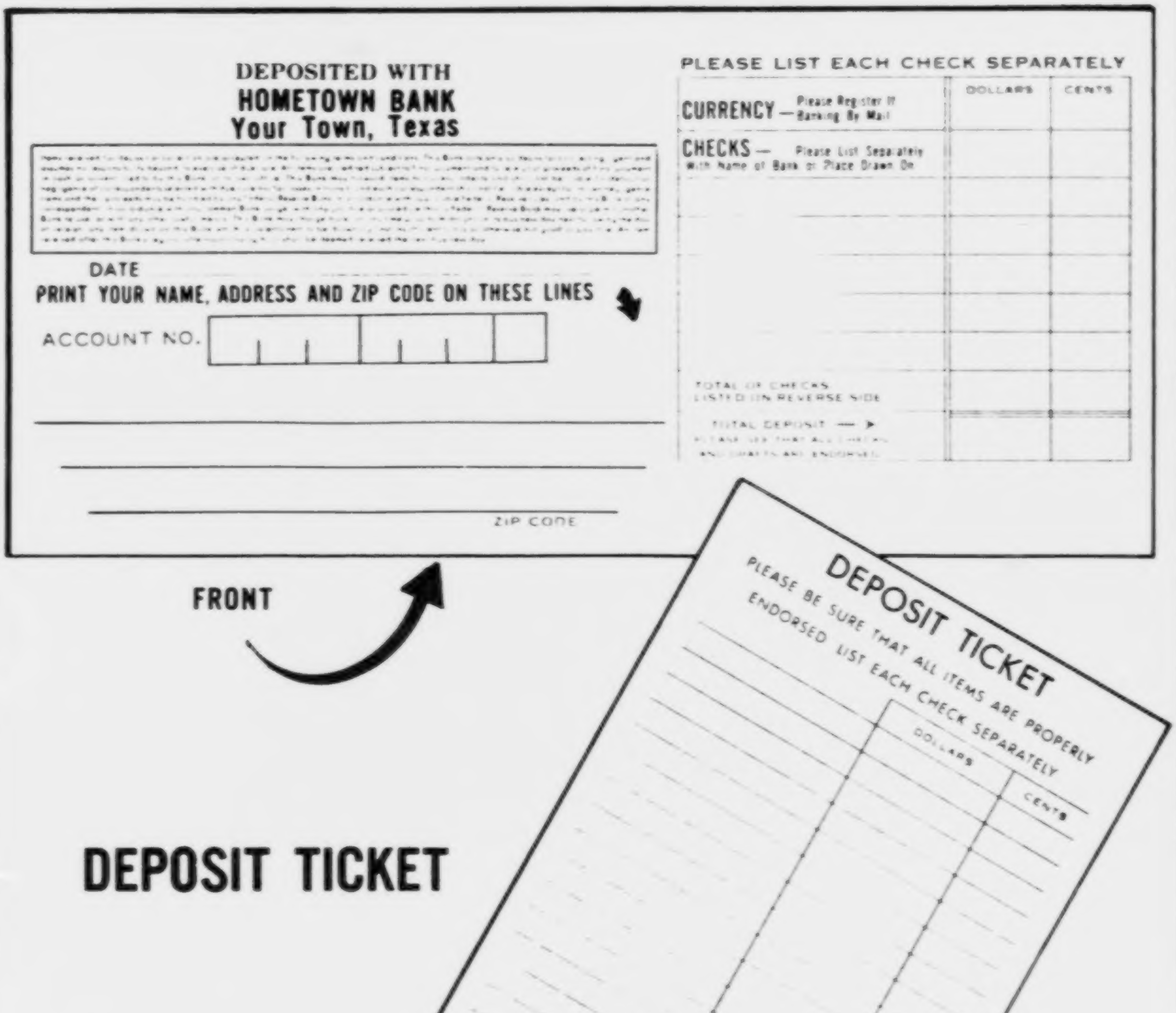
6. Are all additions and subtractions in the register or on the check stubs correct?

V. MAINTAINING A CANCELED CHECK FILE

A. File canceled checks, bank statement, and reconciliation form together for future reference.

B. Use a separate file for each month to keep records in order and for easier reference.

C. Retain these financial records for seven years or for the length of time determined by company policy.



DEPOSITED WITH
HOMETOWN BANK
Your Town, Texas

DATE

PRINT YOUR NAME, ADDRESS AND ZIP CODE ON THESE LINES

ACCOUNT NO.

ZIP CODE

PLEASE LIST EACH CHECK SEPARATELY

	DOLLARS	CENTS
CURRENCY — Please Register If Banking By Mail		
CHECKS — Please List Separately With Name of Bank or Place Drawn On		
TOTAL OF CHECKS LISTED ON REVERSE SIDE		
TOTAL DEPOSIT → PLEASE SEE THAT ALL CHECKS AND DRAFTS ARE ENDORSED		

DEPOSIT TICKET

PLEASE BE SURE THAT ALL ITEMS ARE PROPERLY ENDORSED LIST EACH CHECK SEPARATELY

	DOLLARS	CENTS
TOTAL		

PLEASE ENTER THIS TOTAL AMOUNT ON THE FRONT OF THE DEPOSIT TICKE.

DEPOSIT TICKET

BEST COPY AVAILABLE

RECONCILIATION OF BANK STATEMENT

TO PROVE THE BALANCE AS SHOWN ON YOUR STATEMENT:

1) Sort the checks numerically or by date issued.

2) Check off the stubs of your check book each of the checks paid by the bank and make a list of the numbers and amounts of those still outstanding; to the sum of the outstanding checks add the balance as shown in your check book after deducting any charges made by the bank

3) This amount should correspond with the bank's balance as shown on the statement.

4) List all deposits which do not appear on the statement, and add to the total balance as shown by the statement.

5) The two results should agree, and if so, the statement is correct.

Statement of

In Account With

HOME TOWN BANK

DATE	CHECKS	DEPOSITS	BALANCE
	BALANCE BROUGHT FORWARD		

RECORD KEEPING

75.89(a)(2)(c) OFFICE EDUCATION ESSENTIAL ELEMENT
FINANCIAL RESPONSIBILITIES

Apply the principles of record keeping

PRINCIPLES OF RECORD KEEPING

UNIT OBJECTIVE

The student will be able to apply principles of record keeping, including procedures in maintaining a petty cash fund and procedures of handling payroll.

SPECIFIC OBJECTIVES

1. Define terms of petty cash and payroll.
2. Identify characteristics and purposes of a petty cash fund.
3. Cite the procedures for handling the petty cash fund.
4. Identify the types of payroll deductions and methods of preparing payroll.

TEACHER ACTIVITIES

1. Secure the audiovisual, Handling Financial Responsibilities, Occupational Curriculum Lab.
2. Prepare transparencies of petty cash and payroll procedures.
3. Select activities or practice sets to reinforce the procedures learned.

STUDENT ACTIVITIES

1. Demonstrate the ability to:
    - A. Establish a petty cash fund
    - B. Prepare a petty cash voucher
    - C. Verify the petty cash balance
    - D. Enter transactions in a journal
    - E. Record entries in a petty cash book
    - F. Prove the petty cash book
    - G. Replenish the petty cash fund
2. Demonstrate the ability to:
    - A. Compute gross pay and net pay
    - B. Complete employee time cards
    - C. Prepare employee's earning records
    - D. Record information in the payroll register
    - E. Prepare payroll checks

EVALUATION-Unit Test

ESTIMATED COMPLETION TIME 10-20 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

CLERICAL PAYROLL PROCEDURES
South-Western Publishing Co.

HANDLING FINANCIAL RESPONSIBILITIES IN AN OFFICE
Audiovisual package
Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

SECRETARIAL OFFICE PROCEDURES FOR COLLEGES
South-Western Publishing CVo.

SMALL BUSINESS MANAGEMENT
Delmar Publishers

I. PREPARATION FOR UNIT

A. Preview the unit.

B. Gather materials needed to teach the unit, such as additional resources and references, forms, supplies, handouts, transparency masters.

C. Duplicate adequate number of forms for students to use to complete the activity sheets.

D. Design a bulletin board introducing the unit. Include samples of forms, examples of the various types of petty cash expenses, or payroll forms.

II. OBJECTIVE SHEET

A. Discuss the unit and specific objectives with the students.

B. Add any additional objectives necessary to meet fully the needs of the students.

III. INFORMATION AND ACTIVITY SHEETS

A. Discuss the terms and definitions and the purpose of a petty cash fund.

B. Discuss the types of petty cash expenses. Provide examples of other expenses that may be included in petty cash.

C. Discuss the various forms used with petty cash funds. Use handouts or transparencies to reinforce the information.

D. Discuss the types of forms used in preparing the payroll. Provide additional samples obtained from local businesses to illustrate the various types that may be used.

E. Discuss the various procedures for preparing payroll forms.

F. Arrange for a field trip to a local business which incorporates the use of a computer in the preparation of payroll so students can see the applications the computer performs.

G. Have students complete activities from Financial Responsibilities publication from Occupational Curriculum Laboratory.

75.89(a)(2)(C)

OBJECTIVE: The student will be able to apply principles of record keeping, including procedures in maintaining a petty cash fund and procedures of handling payroll.

	MASTERY	NON MASTERY
1. Define terms of petty cash and payroll.		
2. Identify characteristics and purposes of a petty cash fund.		
3. Cite the procedures for handling the petty cash fund.		
4. Identify the types of payroll deducations and methods of preparing payroll.		

PERFORMANCE CHART

THE PETTY CASH FUND

I. TERMS AND DEFINITIONS

A. Petty cash fund--a designated amount of cash set aside to pay for small business expenses

B. Petty cash voucher--a receipt that provides a record of each payment made from the petty cash fund and the reason for payment

C. Petty cash book--a book for recording and organizing all petty cash transactions and of proving the petty cash fund

D. Petty cash summary--a report which lists the total payments for each classification expense and the amount of cash on hand

E. Journal--a book in which financial transactions of a business are written

F. Journal entry--a recording of a financial transaction in a journal

G. Pencil footings--totals written in small figures at the bottom of amount columns

H. Replenish--to build up the petty cash fund to the original amount by adding money

II. PURPOSE OF A PETTY CASH FUND

A. To avoid writing checks for small amounts of money

B. To pay for minor office expenses

1. Postage

2. Incidental office supplies

3. Bus or taxi fares for business errands

4. Refreshments, such as coffee and donuts

III. CLASSIFICATIONS OF PETTY CASH EXPENSES

A. Office expenses--postage, pens, pencils, stationery, and others

B. Delivery expenses--bus and taxi fare for errands

C. General expenses--refreshments, meals for employees working overtime, gifts, charity donations, and others

(NOTE: These may not be the same for all businesses.)

IV. PARTS OF A PETTY CASH VOUCHER

A. Voucher number

B. Amount paid out of fund

C. Date of transaction

D. Account number or name to which expenditure is charged

E. Reason for expenditure

F. Classification of expenditure

G. Signatures of the person in charge of the petty cash and the person who received the money

V. PARTS OF A PETTY CASH BOOK

A. Date column--month and day entry is made

B. Explanation--description of transcription

C. Voucher number--number on each voucher

D. Receipts column--record of any money added to the fund

E. Payments column--record of the amount of money paid out

F. Expense columns--record of distribution of payments

VI. PARTS OF A PETTY CASH SUMMARY

A. List of classifications and total payments for each classification

B. Sum of all expenses

C. Amount of cash on hand

D. Final total, which equals amount set aside for petty cash

VII. CHARACTERISTICS OF A PETTY CASH FUND

A. A check is written to establish the fund.

B. A voucher is obtained for each payment.

C. The original amount in the petty cash fund does not change.

D. The cash on hand plus the total of the vouchers should equal the amount set aside in the petty cash fund.

E. A petty cash summary is prepared when it is time to replenish the petty cash fund.

F. Vouchers are numbered consecutively.

G. The petty cash fund is proved at the end of each day.

H. The classification titles for the expense columns of a petty cash book will vary from business to business.

I. The petty cash book is proved when the petty cash fund is replenished.

J. The petty cash summary provides the information for issuing the check to replenish the petty cash fund.

VIII. PROCEDURES FOR MAINTAINING THE PETTY CASH FUND

A. Establish the fund.

B. Prepare vouchers for each withdrawal.

C. Prove the petty cash fund daily.

D. Maintain a petty cash book.

E. Prove the petty cash book.

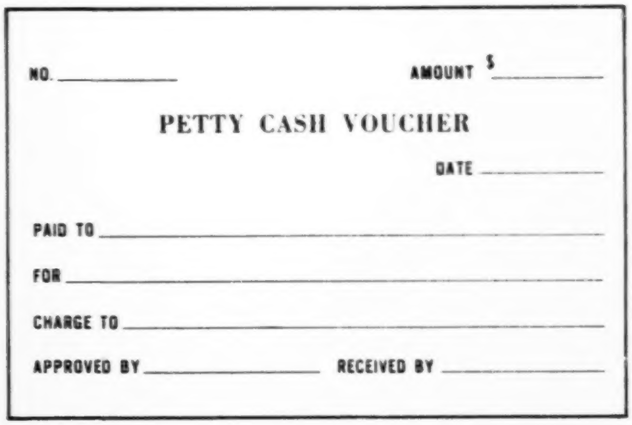
F. Prepare a petty cash summary.

G. Replenish the petty cash fund.

PETTY CASH FUND

PAY FOR SMALL EXPENSES INVOLVED IN OPERATING OFFICE

- * STAMPS
- * DELIVERY
- * ADVERTISING
- * BUS FARE FOR ERRANDS
- * TAXI FARE
- * DINNER FOR EMPLOYEES WHO WORK LATE
- * OFFICE SUPPLIES



NO. ____________ AMOUNT $ ____________

PETTY CASH VOUCHER

DATE ____________

PAID TO ____________

FOR ____________

CHARGE TO ____________

APPROVED BY ____________ RECEIVED BY ____________

UNIT OVERVIEW

PAYROLL PROCEDURES

I. TERMS AND DEFINITIONS

- A. Employee's Withholding Exemption Certificate--a form used to indicate marital status and number of exemptions for use in determining payroll deductions
- B. Federal Insurance Compensation Act (FICA)--commonly referred to as the Social Security tax which provides pensions for retired persons, provides survivor benefits for dependents of insured workers who are disabled or dead, and provides hospital and medical insurance to those persons over the age of 65
- C. Gross pay--the total amount earned by an employee before taxes or other deductions are taken from it
- D. Hourly employees--persons paid wages according to the number of hours they work each week; paid a certain amount for each hour
- E. Net pay--an individual's earnings after deductions have been taken out
- F. Payroll register--a form used to summarize the payroll information for all employees
- G. Salaried employees--persons paid a set amount of money each week or month
- H. Time card--a form used for recording the hours an employee works
- I. W-4 form--another term for Employee's Withholding Exemption Certificate

II. GENERAL PAYROLL INFORMATION

- A. Categories of employees
  - 1. Salaried employees
    - a. Paid a set amount of money each week or month
    - b. Mainly executives and professional employees
    - c. Not usually paid for overtime
  - 2. Voluntary deductions

    (NOTE: Most employees elect to have other deductions taken from their gross pay, including any of the following.)

    - a. Health and hospitalization insurance
    - b. Group life insurance
    - c. Disability insurance
    - d. Savings bond
    - e. Union dues
    - f. Deposits to savings account
- C. Methods of preparing payroll
  - 1. Manual system
    - a. Each step is performed by hand with some use of typewriters, adding machines, and calculators.
    - b. Information is computed and recorded on one form at a time.
    - c. This method is used mainly in small businesses.
  - 2. Computer system
    - a. Payroll information is entered into the computer for processing and storage.
    - b. Magnetic tape, punched cards or tape are used to permanently store information.
    - c. This method saves time, effort, and space when preparing the payroll for a business.

III. PAYROLL FORMS

- A. Types of payroll forms
  - 1. Employee's Exemption Certificate (W-4 form)
    - a. Completed on all employees and filed with the employer

b. Contains the following information:

   (1) name and address

   (2) Social Security number

   (3) marital status

   (4) number of exemptions

c. Used to determine the amount of FICA to be withheld from an employee's gross pay.

2. Employee's time card

   a. Usually completed by hourly employees

      (NOTE: Some employers may require salaried employee to complete time cards.)

   b. Contains the following information:

      (1) name of employee

      (2) pay period

      (3) wage or salary

      (4) number of hours worked

   c. Used as a basis for computing an employee's wages for a pay period.

3. Employee's earnings record

   a. Completed by the employer for each employee

   b. Contains the following information:

      (1) employee's name and address

      (2) Social Security number

      (3) pay period

      (4) wages and withholdings

   c. Used to prepare reports of earnings and withholdings to government agencies

4. Payroll register

   a. Contains a summary of all employee's earnings records for a given pay period

   b. Provides the employer with a permanent record of all wages and salaries paid

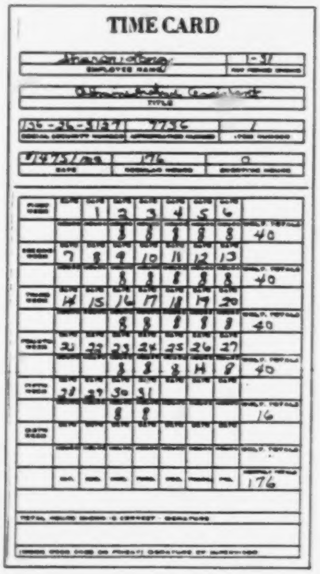
5. Payroll check

   a. Prepared for each employee

   b. Contains two parts

      (1) The check which includes the check number, date, name of payee, amount of check, and signature of payer

      (2) The voucher (stub) which includes the name of the employee, amount of pay earned, the deductions, and a summary of earnings and deductions for the year



TIME CARD

1-31

1

176

0

		1	2	3	4	5	6	
			8	8	8	8	8	40
	7	8	9	10	11	12	13	
			8	8	8	8	8	40
	14	15	16	17	18	19	20	
			8	8	8	8	8	40
	21	22	23	24	25	26	27	
			8	8	8	H	8	40
	28	29	30	31				
			8	8				16
								176

6. Wage and tax statement (W-2 form)
    a. Prepared by the employer at the end of the calendar year for each employee
    b. Shows the amount of money earned for the year, withholdings, and Social Security contribution
    c. Attached to the employee's income tax return at the time of filing

B. Steps in preparing payroll forms
1. Employee's earnings record
    a. Complete a form for each employee.
    b. Enter the personal information for the employee obtained from:
        (1) The W-4 form
        (2) The employee's time card
    c. Compute the gross pay for hourly employees.
        (1) Total the hours recorded on the time card.
        (2) Subtract time for absence or tardiness.

            (NOTE: Do not deduct time if sick leave, vacation time, or paid holidays are taken.)
        (3) Multiply the total regular hours worked by the rate of pay.
        (4) Multiply the overtime hours by the overtime rate.
        (5) Add the two totals together to find the gross pay.
        (6) Enter the gross pay on the earnings records.
    d. Compute the FICA deductions for all employees.
        (1) Multiply the employee's gross pay by the percentage required by law.

            EXAMPLE:

            $1,888.02 gross pay x 6.65% =

            $1,888.02 x .0665 = $125.55 FICA
        (2) Enter the FICA deduction on the earnings record.
    e. Determine the federal income tax deduction.
        (1) Use the table provided by the Internal Revenue Service.

            (NOTE: Separate tables are provided for use in determining the deduction for single, married, or head of household.)
        (2) Read down the income column until you find the appropriate gross income range.
        (3) Read across to the column headed by the toal number of exemptions claimed by the individual.
        (4) Enter the amount shown where the two lines meet on the employee's earnings record.

f. Record other deductions.

   (1) Compute state and/or local taxes, if applicable, and enter on the employee's earnings record.

   (2) Record voluntary deductions in the appropriate spaces on the earnings record.

g. Enter the summary of entries at the end of each quarter on the bottom portion of the record.

2. Payroll register

   a. Enter the pay period date.

   b. Transfer the payroll information from each employee's earnings record to the appropriate spaces on the register.

   c. Total the deductions for each employee and enter in the appropriate space.

   d. Compute the net pay.

      (1) Subtract the total deductions from the gross pay.

      (2) Enter the net pay amount in the space provided.

   e. Double check each entry for accuracy.

3. Payroll check

   a. Prepare a payroll check for each employee.

   b. Enter the following information on the check portion of the payroll check.

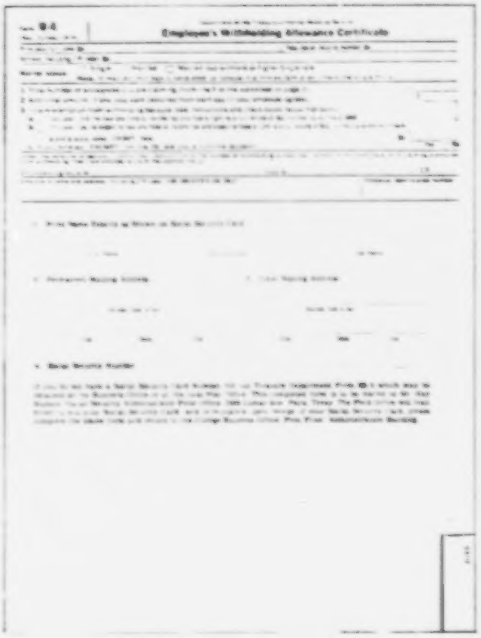
      (1) Check number and date

      (2) Name of payee

      (3) Amount of check

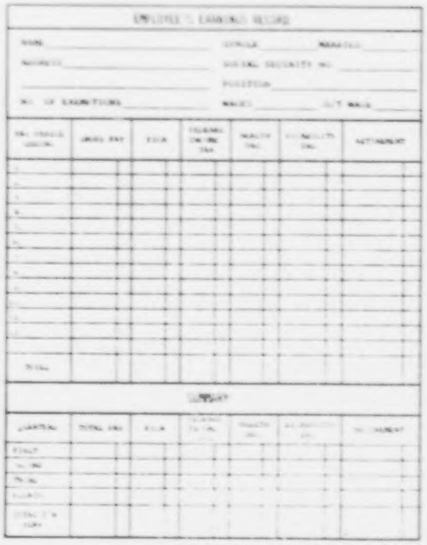
      (4) Signature of payer

   c. Transfer the information from the payroll register to the voucher portion of the payroll check.



Form W-4

Employee's Withholding Allowance Certificate



EMPLOYEE'S EARNINGS RECORD

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ACTIVITY SHEET 1--ESTABLISHING THE PETTY CASH FUND

Directions: Using the forms provided, establish a petty cash fund of $100 for the Tally Corporation for July 1.

A. Write a check for the amount to be set aside in the petty cash fund.

1. Enter the date.

2. Make the check out to "Petty Cash."

3. Sign the check as the authorized person.

(NOTE: In a real situation, the check would be cashed and placed in the petty cash box.)

B. Record the amount on the journal page.

1. Enter the date.

2. Write "Petty Cash Fund" on the first line in the description column.

3. Enter $100 in the debit column on the same line.

4. Indent two spaces and write "Cash" on the next line of the description column.

5. Enter $100 in the credit column.

C. Record the amount received in the petty cash book.

1. Enter the date.

2. Write "Established Fund" and the check number in the explanation column.

3. Record the amount received in the receipts column.

ACTIVITY SHEET 2--PREPARING VOUCHERS

Directions: Following the procedures below, prepare vouchers for the Tally Corporation from the information given. Use the forms provided and start with Voucher #1.

A. Procedures

1. Enter the number of the voucher.
    a. Number vouchers consecutively.
    b. Use a pen to fill in vouchers.
2. Enter the date.
3. Enter the name to whom payment was made.
4. Enter the amount.
5. Enter the reason for the payment.
6. Enter the signatures.

(NOTE: Vouchers would be placed in the petty cash box as a receipt for the money issued.)

B. Information

1. July 6, paid $2.50 to Joyce Wilson for taxi fare to deliver reports.
2. July 7, paid Henry Lockmore $15.00 for postage stamps.
3. July 8, gave Henry Lockmore $4.60 to buy coffee and donuts for the board members.
4. July 12, gave $16.50 to Albert Jackson for repairing locks on the office door.
5. July 13, gave Joyce Wilson $6.40 to purchase tape and wrapping paper for mailing packages.
6. July 16, gave Gail Freeman $2.70 to purchase liquid correction fluid.
7. July 20, gave $10.00 to Jefferson High School for advertisement in school paper.
8. July 23, gave Henry Lockmore $3.12 for extension cord for the office.
9. July 29, gave $15.00 to Red Cross.

TALLY CORPORATION
P.O. BOX 752
DALLAS, TX 75228

No. 1400

______________ 19____

88-335
1119

PAY TO THE ORDER OF ______________________________ $________

____ DOLLARS

THE FIRST NATIONAL BANK

____

⑆111903355⑆

DELUXE CHECK PRINTERS

PETTY CASH BOOK

PAGE NO.

DATE	EXPLANATION	VO. NO.	RECEIPTS	PAYMENTS	OFFICE EXPENSE	DELIVERY EXPENSE	GENERAL EXPENSE

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH VOUCHER

No.

Date

Paid to

For

AMOUNT

(Received by)

(Approved by)

PETTY CASH SUMMARY

ENDON CORPORATION
PETTY CASH SUMMARY
July 30, 1977

Advertising Expense	$ 73.42
Delivery expense	26.32
Miscellaneous expense	14.13
Office expense	81.81
Total petty cash vouchers	$195.68
Plus cash in box	34.32
	$230.00

OBJECTIVES OF PAYROLL WORK

1. Compute the amount of gross wages due each employee

2. Compute deductions as required by law

   a. Withholding of federal income tax

   b. Social Security (FICA)

   c. Other state and city deductions

3. Compute voluntary deductions

   a. Insurance
   b. Hospitalization
   c. Union dues
   d. Pension plan

4. Compute net pay

5. Maintain employee's earning record

6. Maintain payroll register

Employee's Withholding Allowance Certificate

The explanatory material below will help you determine your correct number of withholding allowances, and will assist you in completing the Form W–4 at the bottom of this page.

Avoid Overwithholding

By claiming the proper number of withholding allowances you are entitled to, you can keep the amount of tax withheld from your wages to a minimum. In addition to the allowances for personal exemptions to be claimed in items (a) through (g) below, be sure you claim any additional allowances you are entitled to in item (h) "Special withholding allowance," and item (i) "Allowance(s) for itemized deductions."

You may claim the special withholding allowance if you are single with only one employer, or married with only one employer and your spouse is not employed. If you have unusually large itemized deductions you may claim the allowance(s) for itemized deductions to avoid having too much income tax withheld from your wages. While these allowances may be claimed on Form W–4 for withholding purposes, they are not to be claimed under "Exemptions" on your tax return Form 1040 or Form 1040A.

How Many Withholding Allowances May You Claim?

Please use the schedule below to determine the number of allowances you may claim for tax withholding purposes. In determining the number, keep in mind these points. If you are single and hold more than one job, you may not claim the same allowances with more than one employer at the same time; or if you are married and both you and your spouse are employed, you may not claim the same allowances with your employers at the same time. A nonresident alien, other than a resident of Canada, Mexico, or Puerto Rico, may claim only one personal allowance.

Figure Your Total Withholding Allowances Below

(a) Allowance for yourself—enter 1 . . . . ________

(b) Allowance for your spouse—enter 1 . . . . ________

(c) Allowance for your age—if 65 or over—enter 1 . . . . ________

(d) Allowance for your spouse's age—if 65 or over—enter 1 . . . . ________

(e) Allowance for blindness (yourself)—enter 1 . . . . ________

(f) Allowance for blindness (spouse's)—enter 1 . . . . ________

(g) Allowance(s) for dependent(s)—you are entitled to claim an allowance for each dependent you will be able to claim on your Federal income tax return. Do not include yourself or your spouse * . . . . ________

(h) Special withholding allowance—if you are single with only one employer, or married with only one employer and your spouse is not employed—enter 1** . . . . ________

(i) Allowance(s) for itemized deductions—if you do plan to itemize deductions on your income tax return, enter the number from the table on back** . . . . ________

(j) Total—add lines (a) through (i) above. Enter here and on line 1, Form W–4 below . . . . ________

* If you are in doubt as to whom you may claim as a dependent, see the instructions which came with your last Federal income tax return or call your local Internal Revenue Service office.

** This allowance is used solely for purposes of figuring your withholding tax, and cannot be claimed when you file your tax return.

See Table on Back if You Plan to Itemize Your Deductions

Completing Form W–4

If you find that you are entitled to one or more allowances in addition to those which you are now claiming, increase your number of allowances by completing the form below and filing it with your employer. If the number of allowances you previously claimed decreases, you must file a new Form W–4 within 10 days. (Should you expect to owe more tax than will be withheld, you may use the same form to increase your withholding by claiming fewer or "0" allowances on line 1 or by asking for additional withholding on line 2 or both.)

▼ Give the bottom part of this form to your employer; keep the upper part for your records and information ▼

Form **W-4**
(Rev. Sept. 1974)
Department of the Treasury
Internal Revenue Service

Employee's Withholding Allowance Certificate

(This certificate is for income tax withholding purposes only; it will remain in effect until you change it.)

Type or print your full name	Your social security number
Home address (Number and street or rural route)	Marital status ☐ Single ☐ Married (If married but legally seperated, or spouse is a nonresident alien, check the single block.)
City or town, State and ZIP code	

1 Total number of allowances you are claiming . . . . ________

2 Additional amount, if any, you want deducted from each pay (if your employer agrees) . . . . $

I certify that to the best of my knowledge and belief, the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled.

Signature ▶ .... Date ▶ ...., 19......

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COMPUTING GROSS EARNINGS FOR THE HOURLY EMPLOYEE

REGULAR TIME - Amount of time up to 40 hours per week

OVERTIME - Amount of time worked over 40 hours per week

REGULAR RATE OF PAY - Amount earned per hour

OVERTIME RATE OF PAY - 1½ times the regular rate of pay

HOURS WORKED × RATE OF PAY = GROSS EARNINGS

EXAMPLE:

NAME	HOURS WORKED	HOURLY RATE	OVERTIME RATE	REGULAR EARNINGS	OVERTIME EARNINGS	TOTAL GROSS EARNINGS
Julie Belson	42	$3.75	$5.63	$150.00	$11.26	$161.26
Harold Clancy	48	2.96	4.44	118.40	35.52	153.92
Jim Dunlap	36	4.25	6.38	153.00	–	153.00
Alice Hardy	49	4.00	6.00	160.00	54.00	214.00

EMPLOYEE'S EARNINGS RECORD

NAME ______________________ SINGLE __________ MARRIED __________

ADDRESS ______________________ SOCIAL SECURITY NO. __________

______________________ POSITION __________

NO. OF EXEMPTIONS __________ WAGES __________ O/T WAGE __________

PAY PERIOD ENDING	GROSS PAY		FICA		FEDERAL INCOME TAX		HEALTH INS.		DISABILITY INS.		RETIREMENT	
1.												
2.												
3.												
4.												
5.												
6.												
7.												
8.												
9.												
10.												
11.												
12.												
TOTAL												

SUMMARY

QUARTERS	TOTAL PAY		FICA		FEDERAL INCOME TAX		HEALTH INS.		DISABILITY INS.		RETIREMENT	
FIRST												
SECOND												
THIRD												
FOURTH												
TOTAL FOR YEAR												

SINGLE Persons — **MONTHLY** Payroll Period

And the wages are—		And the number of withholding allowances claimed is—										
At least	But less than	0	1	2	3	4	5	6	7	8	9	10 or more
		The amount of income tax to be withheld shall be—										
$580	$600	$80.90	$65.20	$50.20	$35.20	$20.80	$8.30	$0	$0	$0	$0	$0
600	640	87.20	70.60	55.60	40.60	25.60	12.80	.30	0	0	0	0
640	680	95.60	78.10	62.80	47.80	32.80	18.80	6.30	0	0	0	0
680	720	104.00	86.50	70.00	55.00	40.00	25.00	12.30	0	0	0	0
720	760	112.40	94.90	77.40	62.20	47.20	32.20	18.30	5.80	0	0	0
760	800	120.80	103.30	85.80	69.40	54.40	39.40	24.40	11.80	0	0	0
800	840	129.20	111.70	94.20	76.70	61.60	46.60	31.60	17.80	5.30	0	0
840	880	138.10	120.10	102.60	85.10	68.80	53.80	38.80	23.80	11.30	0	0
880	920	148.50	128.50	111.00	93.50	76.00	61.00	46.00	31.00	17.30	4.80	0
920	960	158.90	137.20	119.40	101.90	84.40	68.20	53.20	38.20	23.30	10.80	0
960	1,000	169.30	147.60	127.80	110.30	92.80	75.40	60.40	45.40	30.40	16.80	4.30
1,000	1,040	179.70	158.00	136.40	118.70	101.20	83.70	67.60	52.60	37.60	22.80	10.30
1,040	1,080	190.10	168.40	146.80	127.10	109.60	92.10	74.80	59.80	44.80	29.80	16.30
1,080	1,120	200.50	178.80	157.20	135.50	118.00	100.50	83.00	67.00	52.00	37.00	22.30
1,120	1,160	210.90	189.20	167.60	145.90	126.40	108.90	91.40	74.20	59.20	44.20	29.20
1,160	1,200	221.30	199.60	178.00	156.30	134.80	117.30	99.80	82.30	66.40	51.40	36.40
1,200	1,240	233.20	210.00	188.40	166.70	145.00	125.70	108.20	90.70	73.60	58.60	43.60
1,240	1,280	245.20	220.40	198.80	177.10	155.40	134.10	116.60	99.10	81.60	65.80	50.80
1,280	1,320	257.20	232.20	209.20	187.50	165.80	144.20	125.00	107.50	90.00	73.00	58.00
1,320	1,360	269.20	244.20	219.60	197.90	176.20	154.60	133.40	115.90	98.40	80.90	65.20
1,360	1,400	281.20	256.20	231.20	208.30	186.60	165.00	143.30	124.30	106.80	89.30	72.40
1,400	1,440	293.20	268.20	243.20	218.70	197.00	175.40	153.70	132.70	115.20	97.70	80.20
1,440	1,480	306.20	280.20	255.20	230.20	207.40	185.80	164.10	142.40	123.60	106.10	88.60
1,480	1,520	319.80	292.20	267.20	242.20	217.80	196.20	174.50	152.80	132.00	114.50	97.00
1,520	1,560	333.40	305.10	279.20	254.20	229.20	206.60	184.90	163.20	141.60	122.90	105.40
1,560	1,600	347.00	318.70	291.20	266.20	241.20	217.00	195.30	173.60	152.00	131.30	113.80
1,600	1,640	360.60	332.30	304.00	278.20	253.20	228.20	205.70	184.00	162.40	140.70	122.20
1,640	1,680	374.20	345.90	317.60	290.20	265.20	240.20	216.10	194.40	172.80	151.10	130.60
1,680	1,720	387.80	359.50	331.20	302.80	277.20	252.20	227.20	204.80	183.20	161.50	139.80
1,720	1,760	401.40	373.10	344.80	316.40	289.20	264.20	239.20	215.20	193.60	171.90	150.20
1,760	1,800	415.00	386.70	358.40	330.00	301.70	276.20	251.20	226.20	204.00	182.30	160.60
1,800	1,840	428.60	400.30	372.00	343.60	315.30	288.20	263.20	238.20	214.40	192.70	171.00
1,840	1,880	442.20	413.90	385.60	357.20	328.90	300.60	275.20	250.20	225.20	203.10	181.40
1,880	1,920	457.10	427.50	399.20	370.80	342.50	314.20	287.20	262.20	237.20	213.50	191.80
1,920	1,960	472.70	441.10	412.80	384.40	356.10	327.80	299.40	274.20	249.20	224.20	202.20
1,960	2,000	488.30	455.80	426.40	398.00	369.70	341.40	313.00	286.20	261.20	236.20	212.60
2,000	2,040	503.90	471.40	440.00	411.60	383.30	355.00	326.60	298.30	273.20	248.20	223.20
2,040	2,080	519.50	487.00	454.50	425.20	396.90	368.60	340.20	311.90	285.20	260.20	235.20
2,080	2,120	535.10	502.60	470.10	438.80	410.50	382.20	353.80	325.50	297.20	272.20	247.20
2,120	2,160	550.70	518.20	485.70	453.20	424.10	395.80	367.40	339.10	310.80	284.20	259.20
2,160	2,200	566.30	533.80	501.30	468.80	437.70	409.40	381.00	352.70	324.40	296.20	271.20
2,200	2,240	581.90	549.40	516.90	484.40	451.90	423.00	394.60	366.30	338.00	309.60	283.20
2,240	2,280	397.50	565.00	532.50	500.00	467.50	436.60	408.20	379.90	351.60	323.20	295.20
2,280	2,320	613.10	580.60	548.10	515.60	483.10	450.60	421.80	393.50	365.20	336.80	308.50
2,320	2,360	628.70	596.20	563.70	531.20	498.70	466.20	435.40	407.10	378.80	350.40	322.10
2,360	2,400	644.30	611.80	579.30	546.80	514.30	481.80	449.30	420.70	392.40	364.00	335.70
2,400	2,440	659.90	627.40	594.90	562.40	529.90	497.40	464.90	434.30	406.00	377.60	349.30
2,440	2,480	675.50	643.00	610.50	578.00	545.50	513.00	480.50	448.00	419.60	391.20	362.90
2,480	2,520	691.10	658.60	626.10	593.60	561.10	528.60	496.10	463.60	433.20	404.80	376.50
2,520	2,560	706.70	674.20	641.70	609.20	576.70	544.20	511.70	479.20	446.80	418.40	390.10
2,560	2,600	722.30	689.80	657.30	624.80	592.30	559.80	527.30	494.80	462.30	432.00	403.70
2,600	2,640	737.90	705.40	672.90	640.40	607.90	575.40	542.90	510.40	477.90	445.60	417.30
2,640	2,680	753.50	721.00	688.50	656.00	623.50	591.00	558.50	526.00	493.50	461.00	430.90
2,680	2,720	769.10	736.60	704.10	671.60	639.10	606.60	574.10	541.60	509.10	476.60	444.50
2,720	2,760	784.70	752.20	719.70	687.20	654.70	622.20	589.70	557.20	524.70	492.20	459.70
		39 percent of the excess over $2,760 plus—										
$2,760 and over		792.50	760.00	727.50	695.00	662.50	630.00	597.50	565.00	532.50	500.00	467.50

MARRIED Persons — **MONTHLY** Payroll Period

And the wages are—		And the number of withholding allowances claimed is—										
At least	But less than	0	1	2	3	4	5	6	7	8	9	10 or more
		The amount of income tax to be withheld shall be—										
$1,360	$1,400	$220.00	$200.00	$181.10	$163.60	$146.10	$128.60	$111.90	$96.90	$81.90	$66.90	$52.00
1,400	1,440	229.60	209.60	189.60	172.00	154.50	137.00	119.50	104.10	89.10	74.10	59.10
1,440	1,480	239.20	219.20	199.20	180.40	162.90	145.40	127.90	111.30	96.30	81.30	66.30
1,480	1,520	248.80	228.80	208.80	188.80	171.30	153.80	136.30	118.80	103.50	88.50	73.50
1,520	1,560	258.40	238.40	218.40	198.40	179.70	162.20	144.70	127.20	110.70	95.70	80.70
1,560	1,600	268.00	248.00	228.00	208.00	188.10	170.60	153.10	135.60	118.10	102.90	87.90
1,600	1,640	278.40	257.60	237.60	217.60	197.60	179.00	161.50	144.00	126.50	110.10	95.10
1,640	1,680	289.60	267.20	247.20	227.20	207.20	187.40	169.90	152.40	134.90	117.40	102.30
1,680	1,720	300.80	277.40	256.80	236.80	216.80	196.80	178.30	160.80	143.30	125.80	109.50
1,720	1,760	312.00	288.60	266.40	246.40	226.40	206.40	186.70	169.20	151.70	134.20	116.70
1,760	1,800	323.20	299.80	276.50	256.00	236.00	216.00	196.00	177.60	160.10	142.60	125.10
1,800	1,840	334.40	311.00	287.70	265.60	245.60	225.60	205.60	186.00	168.50	151.00	133.50
1,840	1,880	345.60	322.20	298.90	275.60	255.20	235.20	215.20	195.20	176.90	159.40	141.90
1,880	1,920	356.80	333.40	310.10	286.80	264.80	244.80	224.80	204.80	185.30	167.80	150.30
1,920	1,960	368.00	344.60	321.30	298.00	274.60	254.40	234.40	214.40	194.40	176.20	158.70
1,960	2,000	379.70	355.80	332.50	309.20	285.80	264.00	244.00	224.00	204.00	184.60	167.10
2,000	2,040	392.50	367.00	343.70	320.40	297.00	273.70	253.60	233.60	213.60	193.60	175.50
2,040	2,080	405.30	378.60	354.90	331.60	308.20	284.90	263.20	243.20	223.20	203.20	183.90
2,080	2,120	418.10	391.40	366.10	342.80	319.40	296.10	272.80	252.80	232.80	212.80	192.80
2,120	2,160	430.90	404.20	377.60	354.00	330.60	307.30	284.00	262.40	242.40	222.40	202.40
2,160	2,200	443.70	417.00	390.40	365.20	341.80	318.50	295.20	272.00	252.00	232.00	212.00
2,200	2,240	456.50	429.80	403.20	376.50	353.00	329.70	306.40	283.00	261.60	241.60	221.60
2,240	2,280	469.30	442.60	416.00	389.30	364.20	340.90	317.60	294.20	271.20	251.20	231.20
2,280	2,320	482.10	455.40	428.80	402.10	375.40	352.10	328.80	305.40	282.10	260.80	240.80
2,320	2,360	494.90	468.20	441.60	414.90	388.20	363.30	340.00	316.60	293.30	270.40	250.40
2,360	2,400	507.70	481.00	454.40	427.70	401.00	374.50	351.20	327.80	304.50	281.20	260.00
2,400	2,440	521.10	493.80	467.20	440.50	413.80	387.20	362.40	339.00	315.70	292.40	269.60
2,440	2,480	535.90	506.60	480.00	453.30	426.60	400.00	373.60	350.20	326.90	303.60	280.20
2,480	2,520	550.70	519.80	492.80	466.10	439.40	412.80	386.10	361.40	338.10	314.80	291.40
2,520	2,560	565.50	534.60	505.60	478.90	452.20	425.60	398.90	372.60	349.30	326.00	302.60
2,560	2,600	580.30	549.40	518.60	491.70	465.00	438.40	411.70	385.00	360.50	337.20	313.80
2,600	2,640	595.10	564.20	533.40	504.50	477.80	451.20	424.50	397.80	371.70	348.40	325.00
2,640	2,680	609.90	579.00	548.20	517.40	490.60	464.00	437.30	410.60	384.00	359.60	336.20
2,680	2,720	624.70	593.80	563.00	532.20	503.40	476.80	450.10	423.40	396.80	370.80	347.40
2,720	2,760	639.50	608.60	577.80	547.00	518.20	489.60	462.90	436.20	409.60	382.90	358.60
2,760	2,800	654.30	623.40	592.60	561.80	530.90	502.40	475.70	449.00	422.40	395.70	369.80
2,800	2,840	669.10	638.20	607.40	576.60	545.70	515.20	488.50	461.80	435.20	408.50	381.80
2,840	2,880	683.90	653.00	622.20	591.40	560.50	529.70	501.30	474.60	448.00	421.30	394.60
2,880	2,920	698.70	667.80	637.00	606.20	575.30	544.50	514.10	487.40	460.80	434.10	407.40
2,920	2,960	713.50	682.60	651.80	621.00	590.10	559.30	528.50	500.20	473.60	446.90	420.20
2,960	3,000	728.30	697.40	666.60	635.80	604.90	574.10	543.30	513.00	486.40	459.70	433.00
3,000	3,040	743.10	712.20	681.40	650.60	619.70	588.90	558.10	527.20	499.20	472.50	445.80
3,040	3,080	757.90	727.00	696.20	665.40	634.50	603.70	572.90	542.00	512.00	485.30	458.60
3,080	3,120	772.70	741.80	711.00	680.20	649.30	618.50	587.70	556.80	526.00	498.10	471.40
3,120	3,160	787.50	756.60	725.80	695.00	664.10	633.30	602.50	571.60	540.80	510.90	484.20
3,160	3,200	802.30	771.40	740.60	709.80	678.90	648.10	617.30	586.40	555.60	524.80	497.00
3,200	3,240	817.10	786.20	755.40	724.60	693.70	662.90	632.10	601.20	570.40	539.60	509.80
3,240	3,280	831.90	801.00	770.20	739.40	708.50	677.70	646.90	616.00	585.20	554.40	523.50
3,280	3,320	846.70	815.80	785.00	754.20	723.30	692.50	661.70	630.80	600.00	569.20	538.30
3,320	3,360	861.50	830.60	799.80	769.00	738.10	707.30	676.50	645.60	614.80	584.00	553.10
3,360	3,400	876.30	845.40	814.60	783.80	752.90	722.10	691.30	660.40	629.60	598.80	567.90
3,400	3,440	891.10	860.20	829.40	798.60	767.70	736.90	706.10	675.20	644.40	613.60	582.70
3,440	3,480	905.90	875.00	844.20	813.40	782.50	751.70	720.90	690.00	659.20	628.40	597.50
3,480	3,520	920.70	889.80	859.00	828.20	797.30	766.50	735.70	704.80	674.00	643.20	612.30
3,520	3,560	935.50	904.60	873.80	843.00	812.10	781.30	750.50	719.60	688.80	658.00	627.10
		37 percent of the excess over $3,560 plus—										
$3,560 and over		942.90	912.00	881.20	850.40	819.50	788.70	757.90	727.00	696.20	665.40	634.50

BUSINESS MACHINES

75.89(a)(1)(h) OFFICE EDUCATION ESSENTIAL ELEMENT

Demonstrate basic knowledge and usage of business machines

BUSINESS MACHINES

UNIT OBJECTIVE

The student will be able to demonstrate basic knowledge and usage of the following business machines: dictation/transcription machines, reproducing machines, word processors, electronic typewriters, electronic calculators, and microcomputers.

SPECIFIC OBJECTIVES

1. Identify dictation/transcription equipment and techniques.
2. Identify the correct steps for dictation.
3. List five skills required of a transcriptionist.
4. List the components of a display and mechanical text editor.
5. Identify the printing mechanism used to print out information that has been stored.
6. Identify four types of reproduction equipment.
7. Identify the basic components of a microcomputer.
8. Match the names of the operational keys of the electronic calculator with their descriptions and uses.
9. List the preparations for beginning work on the electronic calculator.
10. Demonstrate proficient usage of dictation/transcription machines, electronic typewriters, printing calculators, microcomputers, word processors, and reproducing machines.

TEACHER ACTIVITIES

1. Gather brochures and instruction booklets on office machines.
2. Prepare activities for students to reinforce knowledge of information presented.
3. Prepare a rotation schedule to give students hands-on experience on each type of machine.
4. Select instructional materials, such as practice sets for more reinforcement.
5. Demonstrate for students correct use of each machine.

STUDENT ACTIVITIES

1. Demonstrate the correct procedures for:

    a. Using a dictating unit
    b. Dictating material
    c. Using a transcription unit
    d. Transcribing material

2. Demonstrate the ability to:

    a. Use two reproducing machines
    b. Operate an electronic typewriter and a word processor
    c. Operate a microcomputer
    d. Employ the touch system while operating the electronic calculator.

EVALUATION-Unit Test

ESTIMATED COMPLETION TIME 5-20 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section

RESOURCES

ELECTRONIC CALCULATOR

ACTIVITIES HANDBOOK FOR TEACHING WITH THE HAND-HELD CALCULATOR
Allyn and Bacon

CAPITOL AUDITING SERVICE: A CALCULATOR SIMULATION
Houghton-Mifflin Publishing Co.

OFFICE MACHINES
text, workbook
Houghton-Mifflin Publishing Co.

OFFICE MACHINES COURSE
South-Western Publishing Co.

MICROCOMPUTER KEYPAD OPERATIONS
1 disk and documentation for: Apple, TRS-80 Model III or IV, IBM-PC
Career Aids, Inc.

RPM UNLIMITED: A BUSINESS MACHINES PRACTICE SET
Gregg Division/McGraw-Hill Book Co.

DICTATION AND TRANSCRIPTION

DICTATION EQUIPMENT
filmstrip, trainee work plan
Prentice-Hall Publishing, Co.

GUIDE TO TRANSCRIPTION
Milady Publishing Co.

MACHINE TRANSCRIPTION
text, workbook, cassettes
Glencoe Publishing Co.

MACHINE TRANSCRIPTION: A COMPREHENSIVE APPROACH TO TODAY'S OFFICE SPECIALIST
text, working papers, and tapes
Bobbs-Merrill Educational Publishing

OFFICE STYLE DICTATION TAPES
Milady Publishing Co.

TRANSCRIPTION TECHNIQUES
Milady Publishing Co.

WORD PROCESSING: MACHINE TRANSCRIPTION
Milady Publishing Co.

REPRODUCING MACHINES

DUPLICATING MACHINE PROCESSES: STENCIL, FLUID, OFFSET AND COPIER
South-Western Publishing Co.

OFFICE EQUIPMENT OPERATIONS
film, trainee work plan or slides
Prentice-Hall Publishing Co.

OFFICE PROCEDURES
Greg/McGraw-Hill Publishing Co.

PROCEDURES FOR THE MODERN OFFICE
South-Western Publishing Co.

REPRODUCTION AND ASSEMBLING EQUIPMENT
film, trainee work plan
Prentice-Hall Media

REPROGRAPHICS
Gregg/McGraw-Hill Publishing Co.

REPROGRAPHICS: COPIER, OFFSET, STENCIL, AND FLUID
South-Western Publishing Co.

75.89(a)(1)(H)

PERFORMANCE CHART

OBJECTIVE: The student will be able to demonstrate basic knowledge and usage of the following business machines: dictation/transcription machines, reproducing machines, word processors, electronic typewriters, electronic calculators, and microcomputers.

	MASTERY	NON MASTERY
1. Identify dictation/transcription equipment and techniques.		
2. Identify the correct steps for dictation.		
3. List five skills required of a transcriptionist.		
4. List the components of a display and mechanical text editor.		
5. Identify the printing mechanism used to print out information that has been stored.		
6. Identify four types of reproduction equipment.		
7. Identify the basic components of a microcomputer.		
8. Match the names of the operational keys of the electronic calculator with their descriptions and uses.		
9. List the preparations for beginning work on the electronic calculator.		
10. Demonstrate proficient usage of dictation/transcription machines, electronic typewriters, printing calculators, microcomputers, word processors, and reproducing machines.		
UNIT TEST		

I. PREPARATION FOR UNIT

A. This unit could be used as a short, introductory procedures and hands-on unit for each machine and could be taught as a rotation unit.

1. Select instructional materials or practice sets to reinforce basic knowledge.

2. Obtain brochures and machine instruction manuals for transcribers, calculators, word processors, and reproducing machines.

3. Gather resources and references to provide additional information to support the unit.

B. Dictation/transcription equipment

1. Discuss the information presented on dictation/transcription equipment.

2. Demonstrate dictation and transcription techniques for students.

C. The electronic calculator

1. Discuss the information presented on the electronic calculator.

2. Demonstrate the touch system on the electronic calculator.

D. Reproduction machines

1. Discuss the information presented on reproduction equipment.

2. Make a bulletin board or poster with pictures of reproduction equipment.

3. Demonstrate the use of any machines available.

II. OBJECTIVE SHEET

A. Discuss the unit and specific objectives.

B. Add any additional objectives necessary to meet fully the needs of the unit.

III. UNIT OVERVIEW

Microcomputers

A. Discuss the information presented.

B. Provide the students with magazines regarding the use of microcomputers. Have them read and report on one area of use for a microcomputer.

COMPUTERS

I. TYPES OF COMPUTERS

Computers vary in size, cost, and computer power (speed to process data and memory capacity). A quick comparison of some computers available and their characteristics will help in understanding the abilities of a microcomputer.

A. Electronic calculator

   1. Simplest type of computer
   2. Low in cost
   3. Limited memory capacity
   4. Limited peripheral support

B. Microcomputers

   1. Costs range from $300 to $5,000
   2. Limited in volume of data it can process
   3. Memory capacity can be expanded up to 64K
   4. Used to perform specific applications
   5. Supports peripheral devices

C. Minicomputers

   1. Costs range from $5,000 to $400,000
   2. Can process larger volumes of data than a microcomputer
   3. Memory capacity can be expanded from 32K to 128K
   4. Can perform a variety of functions
   5. Supports peripheral devices

D. Mainframe (large-scale) computer

   1. Largest, most powerful, and most expensive computer available
   2. Can handle large volumes of data and sophisticated problems
   3. Memory capacity can be expanded to millions of words
   4. Supports peripheral devices

II. FUNCTIONS OF A COMPUTER

The computer is just one part of an information processing system. It is a machine in a group of machines, people, and procedures organized to convert information into a more usable form.

A. To process information and to control peripheral equipment

B. To support data input and output activities

C. A tool which helps a person perform certain types of work faster and improve accuracy

ELECTRONIC CALCULATOR

I. TERMS AND DEFINITIONS

A. Memory key--tells the calculator to set aside and remember for later use (store in memory) a number or numbers. When a number is stored in memory, an "M" appears in the upper left corner of the display.

   1. Memory plus key--identified as "M+"; tells the calculator to enter the number just indexed into memory or to add the number to what is already in memory
   2. Memory minus key--identified by "M-"; tells the calculator to store the number just indexed as a negative amount or to subtract the number from what is already in memory
   3. Memory recall key--identified by "MR"; tells the calculator to show the amount that is stored in memory
   4. Memory clear key--identified by "MC"; tells the calculator to remove (clear) all that has been stored in memory

      (NOTE: The numbers in memory or the computations performed in memory do not affect the other numbers in the register.)

B. Operational keys--the keys of the electronic calculator that perform various functions, such as addition, subtraction, multiplication, division, total key, etc.

C. Percent--identified by "%"; tells the calculator to compute the percent just indexed

D. Prorate--to divide or to assess proportionally

E. Register--the inner mechanisms of the calculator where the computation is performed

F. Ten-key keyboard--a keyboard arrangement in which there are ten numeric keys (1-9) arranged in three rows of keys each, with an additional key or bar (0) at the bottom of the last row. In addition to the numeric keys, there are various operational keys.

G. Touch method of operation-- a means of operating a ten-key keyboard by touch rather than by sight. Fingers remain "on base" at home row except when striking other keys.

II. OPERATIONAL KEYS

Below are listed the most common operational keys on the electronic calculator. Various models will have more or less keys, depending upon the manufacturer of the machine.

A. Plus key--identified by "+"; used in addition

B. Minus key--identified by "-"; used in subtraction

C. Multiplication key--identified by "x"; used in multiplication

D. Division key--identified by "÷"; used in division

E. Equals key--identified by "="; tells the calculator to complete a computation and show the answer

F. Total key--identified by "T" or by "*"; tells the calculator to show the total of a calculation. Clears the register

G. Clear key--identified by "C"; removes (clears) information from the register and readies the calculator to accept a new problem

III. PREPARATIONS FOR USING THE ELECTRONIC CALCULATOR

A. Clear work space of unnecessary items.

B. Place the calculator to your right; working materials (workbook or paper, pencil) to your left.

C. Sit straight; feet flat on floor.

D. Curve your index, middle, and ring fingers over the home row keys.

(NOTE: Correct posture is important for your comfort and for ensuring speed and accuracy.)

IV. USING THE TOUCH METHOD

A. Use these fingers to operate the home row keys.

1. Index finger - 4 key

2. Middle finger - 5 key

3. Ring finger--6 key

B. Use the "home row" fingers to stroke the following keys.

1. Index finger

    a. Reach up from the 4 key to strike the 7 key.

    b. Reach down from the 4 key to strike the 1 key.

2. Middle finger

    a. Reach up from the 5 key to strike the 8 key.

    b. Reach down from the 5 key to strike the 2 key.

3. Ring finger

    a. Reach up from the 6 key to strike the 9 key.

    b. Reach down from the 6 key to strike the 3 key.

C. Use the thumb to strike the 0 key.

D. Use the little finger to strike the operational keys to the right of the numeric keyboard.

E. Use the index finger to strike operational keys to the left of the numeric keyboard.

WORD PROCESSING AND ELECTRONIC TYPING EQUIPMENT

I. OUTPUT EQUIPMENT

Output equipment is used to process material into a final typewritten form by using either a typewriting device, a printing device, or a machine that is interfaced with other word processing equipment. The following information covers devices used to keyboard, store, and print information.

A. Automated typing equipment. There are two groups of automated typing systems used to keyboard information:

1. Stand-alone systems are basically self-contained, which means that they are not connected to other equipment in the word processing system. There are three types of stand-alone equipment:

   a. Automatic repetitive typewriters are those which can play back keyboarded material from a storage medium. They are primarily used for repetitive work, such as form letters.

   b. Mechanical (non-visual) Text-Editors have features which enable the typewriter to perform some typing tasks automatically and a magnetic medium on which to record the material being keyboarded. Limited revisions of short documents can be made by this machine. The three components of a mechanical text-editor are:

      (1) Keyboard/printing unit, which is used to keyboard and play back material. As the material is keyboarded, a copy is prepared on paper and the document is also stored on a magnetic medium. After the copy is proofread and corrected, copies are prepared. The printing device converts the information on the magnetic medium into printed words.

      (2) Recording/storage device, which records the material as it is being keyboarded. Most text-editors use a magnetic medium to store information, but some have an internal memory unit on which to store information.

      (3) Logic/intelligence device, which is the "brain" of the text-editor. This device directs the functions and operations of he typewriter. It holds the working memory of the machine and can be either a part of the keyboard unit, or a separate console unit which is connected to the keyboard.

   c. Display Text-Editors are similar to the mechanical text-editors except that they have greater capabilities. For example, the display text-editors have greater revision capabilities. There are four components of a display text-editor:

      (1) Visual display terminal which is composed of the electronic keyboard and the visual screen (CRT). The screen allows the user to see the copy as it is being keyboarded. Corrections and/or revisions are made on the screen by using a cursor (pointer).

(2) Printing device which is separate from the keyboard unit; enables the user to begin keyboarding a second project while the first is being printed.

(3) Recording and storage device which records and stores the material as it is keyboarded.

(4) Logic/Intelligence device or unit which is the "brain" of the machine; directs the functions and operations of the typewriter.

2. Interactive typing systems are text-editors which can communicate or interact with computers or other word processing terminals. They communicate by sending or receiving material over telephone or private wire lines.

   a. Communicating Stand-Alone Text Editors are similar to the text-editors already discussed, except these text editors can send or receive information by telephone or private wire lines connected to another communicating text-editor or computer.

   b. Shared Logic Text-Editors provide for several text-editor keyboard units to share the logic/intelligence and recording/storage components of a computer. These do not have a logic/intelligence unit or a recording storage medium. These computers may be minicomputers connected with a central processing unit (CPU), a large computer which already performs data processing work for the company.

   c. Time-Sharing Text-Editors are linked to a computer located at a service bureau which owns the computer. Users of the computer pay a fee for the computer time used. The users have text-editors which serve as terminals to input an send material to the computer. The computer stores and processes the material. The service bureau provides the users with printed copies.

A. Interfaced equipment. As you have already learned, word processing equipment may include interfaced components, such as a computer interfaced with text-editing typewriters. Word processing equipment is now being expanded to interface with other equipment, such as:

1. Photocomposition equipment which reproduces a copy by photographing on light-sensitive paper. The copy produced holds up to 40 percent more material than a typewritten copy and provides a high-quality copy. Text-editing typewriters are used to keyboard the information onto magnetic medium which is compatible with the typesetting equipment. The photocomposition unit processes the information stored on the magnetic medium into a final, printed copy.

2. Optical Character Recognition Reader (OCR) which scans the typewritten pages and records information onto a magnetic medium for playback on a printer. The reader eliminates re-keyboarding the typed pages on a text-editor. The OCR is used for both input and output of material.

C. Storage Media. An important part of the text-editing typewriter is the recording medium on which the keyboarded material is stored either for immediate playback or for later use. The following media are available for use in recording/storing information:

1. Perforated paper tape--a strip of paper; as material is keyboarded holes are punched into th tape to represent keystrokes.

2. Magnetic tape--a strip of plastic coated with a chemical containing magnetized particles; is enclosed in either a cassette or cartridge. These can be erased and used again.

3. Magnetic floppy disks--a magnetic media which looks like a phonograph record, made of a flexible plastic. These disks can be erased and used again.

   a. Flippy disks--a floppy disk which can be recorded on both sides

   b. Mini disks--a small floppy disk

4. Core memory--text editors that are interfaced with a computer use the core memory of the computer to store information; some typewriters have a core memory as an internal storage medium

5. Built-in storage devices--some typewriters, such as the memory typewriter, have built-in storage devices which cannot be removed from the typewriter

D. Printing mechanisms. A variety of printing mechanisms are used to print out the information which has been stored. Some examples:

1. Typebars--the oldest of the printing mechanisms, and the slowest

2. Elements--type sizes and styles may be changed easily; prints faster than the typebar

3. Printwheels--resemble a daisy flower, with a different letter on each spoke; printwheels are interchangeable, and type at a faster rate than either typebars or elements

4. Ink-jet printers--do not strike against the paper on the platen; instead, ink is sprayed onto the paper, creating the character images. This is one of the fastest printing mechanisms.

5. Laser pictures--keyboarded information processed into a readable format through the use of a laser (light) beam which writes directly onto a type of film; resulting in a very rapid printing speed

6. Fiber optic pictures--carry the light through microscopic glass rods to generate the image; one of the newest and fastest means of printing used used.

REPRODUCTION AND DISTRIBUTION

I. TERMS AND DEFINITIONS

A. Electronic mail--communications transmitted in digital code between locations, and reproduced on paper at the destination.

B. Dumb copier--a copier without a microcomputer; reproduces copy from a hard copy.

C. Intelligent copier--a copier with a "brain"; contains a microcomputer; creates images electronically; capable of creating originals from other than hard copy; can be interfaced with word processing equipment.

D. Telecommunications--the transmission of information between locations by means of electrical or electromagnetic systems, such as telephone or telegraph.

II. REPRODUCTION EQUIPMENT

Reprographics, the process of copying, is an important part of the word processing system because principals usually need a file copy for follow-up, and many times they need copies to send to other people. Reproduction of typewritten material can be done in several wasy:

A. Carbon copies. This is the least expensive method when the number of copies ranges from one to five. Copies can be quickly and easily made, but the quality is poor and productivity is reduced when errors must be corrected.

B. Automatic typewriter. Copies are made by repetitive playout of originals. This is expensive when preparing a large number of copies.

C. Office copies. There are two types of copying devices:

1. Intelligent copiers. Contain a microcomputer which directs the functions and operations of the copier. Examples of intelligent copiers are Savin 840, Xerox 5700.

2. Dumb copiers. Make copies from hard copy only; do not contain a microcomputer.

D. Duplicators. These are used when high volume and superior quality copies are needed. Duplicators can reproduce copies in color and at a faster speed than other methods.

III. DISTRIBUTION EQUIPMENT

Once a document has been processed, it is ready to be distributed. Documents are usually distributed within a company by interdepartmental mail or by messenger. The U.S. Postal Service is normally used to send and receive documents outside the company. However, companies are looking for an alternative to this slow distribution process and are finding that telecommunication-- "electronic" mail--is the answer.

Telecommunication is the process of moving information from one point to another by electronic transmission of impulses by telegraph, radio, cable, telephone, or television. The following are forms of "electronic" mail:

A. Data Communications. Information stored in a computer is transmitted from one location to another, from one computer to another, without being printed on paper. This information is communicated over telephone lines within an organization, to other organizations, and throughout the world.

B. Communicating Word Processors. By using compatible word processing terminals at each location, messages or documents can be sent or received directly. The information is keyboarded and sent by electronic impulses to other locations, where it is printed. Word processing terminals can also be interfaced with copier or photocomposition equipment for transmission and printing of copies at another location.

C. Telex or TWX. These are teletypewriters which can send information to or receive information from similar terminals through telephone or telegraph line connections.

D. Facsimile. The "fax" is used to send or receive information in picture form. The fax scans a document, converting the image into a series of signals which are transmitted over telephone lines. The receiving terminal converts the signal to an image on paper.

MACHINE TRANSCRIPTION

I. DICTATION/TRANSCRIPTION EQUIPMENT

Dictation/transcription equipment is categorized by the type of recording media used either discrete or endless loop media.

A. Discrete media equipment--this equipment uses a recording medium which can be removed (i.e., magnetic card, cassette). Discrete media can be removed from the dictation unit and placed in a transcription unit for play back or filed for later use.

1. Types of discrete media equipment.

a. Portable dictation unit--a self-contained, hand-held unit which enables the dictator to dictate material outside the office at any time. The recording medium is placed in a transcription unit for the typist to transcribe.

b. Desk-top unit--three styles of desk-top units are available:

(1) A dictation unit

(2) A transcription unit

(3) A combination unit with both dictation/transscription capabilities

c. Centralized-recording system--the recording unit is connected either by private wire or by telephone lines to the dictating devices--a microphone or a telephone--which are located at each director's desk. The medium is removed from the recording unit and placed in the transcription unit.

d. Transcription unit--used by the transcriptionist to play back material for typing. Each unit consists of a:

(1) Listening device (headset)

(2) Foot pedal control

(3) Playback unit

2. Special features of a transcription unit

a. Speed control device--used to increase or decrease the speed of the dictation.

b. Tone control device--used to adjust the pitch of the dictator's voice.

c. Recall switch--used ot automatically replay the last few words of the dictation.

d. Volume control device--used to control the loudness and softness of the dictation.

e. Footpedal--used to start and stop the dictation and to replay the dictation.

f. Headset--used to listen to dictation.

3. Types of discrete media

a. Magnetic cards

b. Magnetic tape cassettes

c. Magnetic discs

B. Endless loop system--dictation equipment which uses an endless loop of magnetic tape permanently enclosed in a tank to eliminate handling of the recording medium. The recording unit and the transcription unit are connected either private wire or telephone lines to the dictating devices--a microphone or a telephone--which are located at each dictator's desk.

II. ADVANTAGES AND DISADVANTAGES OF DICTATION/TRANSCRIPTION EQUIPMENT

A. Advantages

1. Saves time and effort

2. Gets work processed quickly

3. Saves money

4. Increases productivity and efficiency

5. Makes better use of the dictator and transcriptionist's time
6. Is the quickest method of capturing information
7. Is faster and easier to transcribe than longhand and shorthand
8. Easier to distribute the workload

B. Disadvantages

   1. Training time required for the dictator and transcriptionist
   2. Resistance of personnel to use equipment
   3. No immediate contact between dictator and transcriptionist
   4. Difficulty in transcriptionist understanding the dictation

III. DICTATION TECHNIQUES

A. Organize for dictation.

   1. Make notes.
   2. Prepare an outline of points to cover.
   3. Gather reference materials.
   4. Organize materials to be dictated according to priority.

B. Use index slip or electronic cueing to:

   1. Indicate special instructions.
   2. Indicate length of each item dictated.

C. Remember the following when dictating:

   1. Speak clearly.
   2. Do not slur or run words together.
   3. Speak at an even pace.
   4. Dictate capitalization, punctuation, paragraphs, indents, quotation marks, etc.
   5. Spell out proper names, confusing names, addresses, etc.

D. Dictate in the following order:

   1. Your name or identifying number
   2. The item being dictated (letter, memo, etc.)
   3. Instructions, such as:
      a. Format
      b. Number of copies
      c. Mailing notations
   4. Subject or reference notations
   5. Salutation and name of addressee (Dear John or Dear Ms. Smith)
   6. Body of material
   7. Closing lines
      a. Complimentary closing
      b. Dictator's name and title
      c. Carbon copies, enclosures, etc.

TRANSCRIBING SKILLS

A. Listening skills--the ability to pay attention, concentrate, and understand that which is being said

B. Language arts skills--include spelling, punctuation, and word usage

C. Typewriting skills--the ability to record rapidly and accurately on paper whatever material is to be transcribed

D. Editing skills--the ability to find and correct any errors that occur during dictation and transcription

E. Logical thinking skills--the ability to determine information that is needed or that has been omitted, and if the message is clear and logical

TRANSCRIBING TECHNIQUES

A. Develop a transcribing rhythm by:

   1. Listening to a group of words or a phrase, then
   2. Stopping and recording and

        3. Typing a group of words, then

        4. Depressing the foot pedal and listening again.

           (NOTE: These steps are repeated throughout the transcription process.)

    B. Correct errors as you transcribe so a mailable copy will be produced.

    C. Verify confusing items by:

        1. Listening closely to the phrases or sentences that do not make sense.

        2. Listening to the sentences that precede and follow the confusing items.

        3. Consulting the dictator.

    D. Proofread the transcript carefully before removing it from the typewriter.

VI. TRANSCRIBING PROCEDURES

    A. Organize work area and arrange material neatly on the desk. You will need the following items:

        1. Transcription unit which includes:

            a. Playback unit

            b. Headset

            c. Foot pedal control

        2. Typewriter and supplies which may include:

            a. Letterhead

            b. Plain paper

            c. Envelopes

            d. Carbon paper

            e. Correcting utensils

        3. Reference books, such as:

            a. Secretarial handbook

            b. Operator's manual for transcription unit

            c. Word division book

            d. Dictionary

            e. Other special references

    B. Prepare to transcribe.

       (NOTE: Refer to the operator's manual for directions on operating the unit.)

        1. Check to see that the unit is plugged in and that the headset and foot pedal are plugged in..

        2. Place the recording medium in the transcription unit.

        3. Turn the unit on.

        4. Preview the dictation.

            a. Listen to the first item to be transcribed from beginning to end.

            b. Mentally punctuate the material.

            c. Make notes on the following items:

                (1) spelling of words that need to be checked.

                (2) names that need to be verified.

                (3) indistinguishable words that need to be clarified.

                (4) special instructions.

        5. Adjust the volume, speed, and tone controls.

        6. Determine the approximate length of the dictation and set the typewriter margins accordingly.

        7. Determine the correct format for each item to be prepared.

    C. Transcribe the material according to priorities.

    D. Proofread the transcript before removing it from the typewriter.

    E. Clean up the work area:

        1. Turn off the transcription unit and typewriter.

        2. Remove the recording medium and file properly.

        3. Cover the machine at the end of the day.

        4. Store supplies in appropriate places.

WORD/DATA PROCESSING TERMINOLOGY

75.89(a)(3)(d) OFFICE EDUCATION ESSENTIAL ELEMENT
EFFECTIVE COMMUNICATION

Become familiar with word processing and computer terminology

WORD/DATA PROCESSING TERMINOLOGY

UNIT OBJECTIVE

The student will become familiar with word processing and computer terminology.

SPECIFIC OBJECTIVES

1. Define terms associated with procedures used in word processing and microcomputers.
2. Define the methods forms procedure of transmitting input in word processing and data processing.
3. Identify methods of output.
4. Summarize the production of a document in word processing.
5. Identify uses and characteristics of microcomputers and computers.
6. Identify parts of a computer.
7. Define the three components of a word processing system.
8. List five advantages of word processing.
9. Identify structures used in word processing.

TEACHER ACTIVITIES

1. Show films from sources provided in the Resource section to acquaint students with word processing and computer terminology and procedures.
2. Gather magazines to provide students with up-to-date resources.
3. Gather other resources and references to provide additional information and supplement the unit.
4. Discuss the unit objectives.
5. Provide activities to reinforce information presented on terminology and concepts.
6. Have students read and report on an article regarding word processing and one on computers.
7. Arrange for a microcomputer vendor to speak to the class.

STUDENT ACTIVITIES

1. Discuss Unit Overview information.
2. Define terms associated with word processing and computers.
3. Discuss methods of input, output, and storage.
4. See films.
5. Read and report on a current magazine article on word processing or computers.
6. Complete activities on word processing terminology and computers.

EVALUATION -Unit Test

ESTIMATED COMPLETION TIME 3-6 hours

RETEACH ACTIVITIES

It is suggested that reteach activities be developed from the following sources:

1. Unit activities not used
2. Combination of used activities
3. Sections of the unit test that need additional reinforcement
4. Additional activities and individualized simulation materials from the resources section.

RESOURCES

BOOKS

BASIC PRINCIPLES OF DATA PROCESSING
Prentice-Hall, Inc.

DATA PROCESSING TERMINOLOGY
Career Aids, Inc.

DICTIONARY OF WORD PROCESSING
Glencoe Publishing Co.

GETTING TO KNOW THE MICROS
filmstrip, cassette, and guide
Apple, Pet Commodore, TRS-80, and Atari
Prentice-Hall Media

THE ILLUSTRATED COMPUTER DICTIONARY
Charles E. Merrill Publishing Co.

INTRODUCTION TO COMPUTER TERMINOLOGY
Houghton-Mifflin

INTRODUCTION TO WORD PROCESSING
Winthrop Publishers, Inc.

WORD/INFORMATION PROCESSING: CONCEPTS AND APPLICATIONS
paperbook, textbook
The Charles E. Merrill Publishing Co.

WORD PROCESSING
Milliken Publishing Co.

WORD PROCESSING CONCEPTS
South-Western Publishing Company

WORD PROCESSING: OPERATIONS, APPLICATIONS, AND ADMINISTRATION
Bobbs-Merrill Educational Publishers

MAGAZINES

ADMINISTRATIVE MANAGEMENT
P.O. Box 544
Martinsville, NJ 08836

BYTE: THE SMALL SYSTEMS JOURNAL
70 Main St.
Peterborough, NH 03458

MODERN OFFICE PROCEDURES
P.O. Box 95759
Cleveland, OH 44101

THE OFFICE
Office Publications, Inc.
P.O. Box 13205
Philadelphia, PA 19101

PERSONAL COMPUTING
167 Corey Rd.
Brookline, MA 02146

THE SECRETARY
National Secretaries Association
Word Headquarters
2440 Pershing, Rd., Suite G-10
Kansas City, MO 64108

WORDS
IWP Association
Maryland Road
Willow Grove, PA 19090

WORD PROCESSING WORLD
Geyer-McAllister Publishers, Inc.
51 Madison Avenue
New York, NY 10010

FILMS

IBM Motion Picture Library
Modern Talking Pictures Services
2323 New Hyde Park Road
New Hyde Park, NY 11040

Information Management Corporation
P.O. Box 787
Solana Beach, CA 92075

The Secretary
National Secretaries Association
World Headquarters
2440 Pershing Rd., Suite G-10
Kansas City, MO 64108

75.89 (a)(3)(D)

OBJECTIVE: The student will become familiar with word processing and computer terminology.

	MASTERY	NON MASTERY
1. Define the three components of a word processing system.		
2. List five advantages of word processing.		
3. Identify structures used in word processing.		
4. Define the methods, forms, and procedures of transmitting input in word processing and data processing.		
5. Identify methods of output.		
6. Summarize the production of a document in word processing.		
7. Identify uses and characteristics of microcomputers and computers.		
8. Identify parts of a computer.		

PERFORMANCE CHART

NOTES TO THE INSTRUCTOR

I. GENERAL INFORMATION

A. Automated offices are progressing at a fast pace in the business world. As they change, the concepts of word processing and computers in the office are also changing.

B. So many new theories of word processing and data processing are developing all of the time that it is necessary to keep abreast of the current trends.

C. It is suggested that instructors subscribe to periodicals to read for information and use in the classroom.

II. PREPARATION FOR THE UNIT

A. Subscribe to a magazine or magazines from the sources provided so students will have access to up-to-date resources.

B. Obtain brochures and information regarding microcomputers and word processors from the sources provided.

C. Gather any resources and references to provide additional information to supplement the unit.

D. Design a bulletin board using pictures and brochures obtained from the manufacturers.

III. OBJECTIVE SHEET

A. Discuss the unit and specific objectives.

B. Add any additional objectives necessary to meet fully the needs of the unit and the students.

IV. UNIT OVERVIEW

A. Overview of microcomputers

   1. Discuss the information presented.

   2. Provide students with magazines regarding the use of word processors and microcomputers. Have them read and report on one area of use for a microcomputer.

B. Types of computers

   1. Discuss the terms and information presented.

   2. Emphasize the differences in each type of computer and word processor.

   3. Provide examples when necessary to facilitate the discussion.

   4. Arrange for a microcomputer vendor or a computer science instructor to speak to the class about the parts of a computer and their functions.

C. Current trends

D. Discuss input and output

   1. Have the students discuss the pros and cons of using the various methods of input.

   2. Emphasize the two types of equipment used in the output of information.

E. Provide activities for reinforcement of information discussed.

   1. Use DCL curriculum activities.

   2. Select activities from resources listed in the Resource section.

V. UNIT TEST

A. Various approaches may be used in testing.

  1. Administer the test when the activities are completed.
  2. Use the test as an additional activity.
  3. Give the test upon completion of the unit.

B. Add test parts corresponding to any information areas of sheets added to the unit.

WORD PROCESSING EQUIPMENT

I. TERMS AND DEFINITIONS

A. AS--administrative support

B. Active document--a document requiring original thought, which includes research, organization, proofreading, and revision

C. Administrative support--one of the two areas of specialization found in a word processing system; nontyping activities, such as handling the mail, answering the telephone, and filing are performed by a specialized secretarial team

D. Administrative support center--the physical location within an office where administrative support personnel work

E. Backlog--work that must be completed

F. Batch--a collection of similar work that can be processed at one time

G. Boiler plate--parts of other documents or paragraphs that are combined to construct a new document

H. Cathode Ray Tube (CRT) Screen--a component of the display text-editor (As material is keyboarded, it appears on the CRT screen.)

I. Cluster--a group of work stations; satellites

J. Correspondence center--another terms for word processing center; the location where the word processing personnel perform typing activities

K. Document--a copy

L. Draft--a rough, unedited copy

M. Editing--correcting and revising a copy before it is put into final form and printed

N. Facsimile--a device which transmits a picture of the hard copy over existing telephone lines

O. Form letter--the same letter to be sent to a number of different people; usually prepared in advance and duplicated

P. Hard copy--written, typed, or printed copy; a document

Q. Hardware--the electrical, electronic, magnetic, and mechanical devices used in a system

R. Input--information or ideas in raw form; submitting work to a word processing center

S. Input equipment--dictation equipment

T. Input unit--a device into which information can be entered; a dictation/recorder

U. Interface--linking two machines or systems together

V. Keyboarding--"typing"; entering information by operating a keyboard

W. Line printer--a device which prints a line at a time

X. Logic--the instructions which are programmed into a system to make it perform all designated functions; for example, automatic underlining or centering

Y. Logging--recording incoming and outgoing work

Z. Longhand--words written by hand

AA. Master--the original copy from which duplicates are made

BB. Mode--the operating conditions of a unit; for example, the ability to record or playback

CC. Output--the final results after input material is processed, revised, and printed out

DD. Output equipment--automated typing systems

EE. Playback--the printing out of information which has been recorded

FF. Prerecorded--material stored on magnetic media for repetitive use

GG. Principal--a person who originates paperwork; a person who dictates "copy" for transcription into final document

HH. Procedure--the step-by-step process for completing a job

II. Proofreading--reading copy to find and mark errors for correction

JJ. Repetitive typing--documents, such as form letters, which are played back over and over

KK. Revision--editing and making typewritten correction

LL. Satellite--a work group composed of processing specialists, administrative support secretaries, or both, which may serve a department, a floor, or any group or principals in a company

MM. Schedule log--a form, prepared and maintained by a supervisor, designed to keep track of incoming and outgoing work in the word processing center

NN. Shared-logic--several text-editors using the memory and processing power of a computer

OO. Soft copy--information stored on a magnetic medium or on CRT screen

PP. Software--programs which instruct or control the operations of a computer

QQ. System--the operations, procedures, personnel, and equipment through which a business activity is conducted

RR. Tasks--duties performed, responsibilities, jobs, assignments, work to be done

SS. Terminal--any device (such as communicating text-editor) capable of sending or receiving information over a communications channel

TT. Transcribe--to produce a typed document from recorded dictation

UU. Transmit--to send from one person or place to another

VV. WP--word processing

WW. Word processing center--the room or designated area with equipment and personnel for processing written communication

XX. Word processing system--the combination of specific procedures, methods, equipment, and people designed to perform and improve the input, output, and distribution of written communication

YY. Work station--a work area for one person

II. INPUT PROCEDURES

The flow of work begins when an idea or information is created by the principal/originator. The idea or information must then be put into a form that can be transmitted to the word processing center for production. The form of input from which the word processing specialist produces a final document greatly affects the time required to transcribe the work.

A. Methods of Input. Several categories of input are used in word processing.

1. Machine dictation is the fastest, easiest means of input. The principal talks into some form of dictation equipment which records the words onto a recording medium for later transcription.

2. Longhand is the slowest means of input, the most difficult to produce, and the most expensive regarding the amount of time spent writing and producing document.

3. Shorthand is faster than longhand, costly in that it requires the time of two persons and time is lost between dictation and transcription.

4. Form letters are repetitive letters which are to be sent to a number of people. The body of the letter is stored on magnetic medium which is played out automatically. As this is played out, the variable information is keyboarded in the the word processing specialist, such as the date, inside address, salutation.

5. Dictation at the typewriter. The word processing specialist keyboards the material as it is being dictated by the principal.

6. Form dictation. The word processing specialist keyboards the information onto a printed form as it is being dictated by the principal.

B. Methods of transmitting input. Once the information and ideas are put onto a medium or hard copy form, they are sent to the word processing center in one of the following ways:

1. Hand carried by a messenger if it is hard or soft copy
2. Sent over private wire or telephone lines to the recorder located in the word processing center

III. OUTPUT PROCEDURES

In word processing, the output is the final document that has been prepared by typing or printing.

A. Forms of Output

1. Letters
2. Memorandums
3. Reports
4. Drafts
5. Forms
6. Statistical information

B. Output Equipment. The following equipment may be used to process the work in the word processing center:

1. Automatic typewriters
2. Mechanical stand-alone text-editors
3. Visual display text-editors
4. Communicating text-editors
5. Shared logic text-editors
6. Time-sharing text-editors
7. OCR scanner
8. Photocomposition equipment
9. Printers

C. Methods of Output. A final document may be prepared in one of the following ways using word processing equipment.

1. Repetitive typing. The material remains unchanged from one copy to the next and contains no variable information. As the material is keyboarded, it is stored on a magnetic medium which eliminates re-keyboarding the material. The medium is placed in any automatic typewriter or printer which automatically plays out the document the required number of times.

2. Combined repetitive and variable typing. The material has constant as well as variable information, such as a form letter in which the body of the letter remains the same, but the date and inside address are different for each letter. The repetitive information is stored on magnetic medium for playout. As the repetitive material is played out automatically, the variable information is manually keyboarded by the word processing specialist.

3. Transcription process. A final document is prepared as the word processing specialist transcribes dictation recorded on a medium in shorthand or in longhand.

4. Editing and revising process. This process is used for output of long, complex documents, such as reports and statistical documents. In this process, the word processing specialist keyboards a rough draft of the material. The rough draft is returned to the principal for editing and revising, and is then returned to the word processing specialist. Using the magnetic medium that was prepared during the first keyboarding, a copy is automatically played out with the word processing specialist manually keyboarding changes made on the rough draft by the

principal. The corrected copy is sent to the principal for additional revising. This process is repeated until the principal is satisfied; then a final document is prepared.

COMPUTER EQUIPMENT

TERMS AND DEFINITIONS

Applications--refers to the different uses or functions that a computer can perform or be used for

Bit--the contraction for binary digit; the smallest unit of information in a binary system of notation

Byte--a series of bits; eight (8) bits equal one (1) byte

General-purpose computer--a machine that can perform many kinds of jobs

Interfaced--linked or joined together

K (Kilobyte)--a measure of the memory capacity of a computer; K equals 1024 bytes. 4K of memory means the computer has 4,096 bytes of memory (4K x 1024 = 4,096)

Memory--that part of the computer which stores programs and data

Memory capacity--the size of memory available in a computer to store data and programs; the number of bytes that can be stored in a computer's memory

Peripheral devices--external equipment or units which are attached to the computer; used to provide printouts from the computer, or to provide more data storage

User--the person operating the computer

Word--another term for byte or group of bytes; the basic unit of data for a computer; a number, a letter, or a code

PERIPHERAL DEVICES

I. TERMS AND DEFINITIONS

A. Auxiliary storage--a secondary, external memory; information from the computer is stored for later use; information is stored in a form that cannot be read by the user

B. CRT screen--cathode ray tube screen; a television-like screen which displays data

C. Digitizer--a device interfaced with the computer to convert any shape, graph, chart, or map into digital information for the computer to use

D. Magnetic disk drive unit--a device used to record information onto a magnetic disc and to send information to the computer's memory

E. Magnetic floppy disc--a magnetic medium which resembles a phonograph record for recording information

F. Magnetic hard disc--magnetic tape concealed in plastic on which data is recorded

G. Magnetic tape unit--a device used to record information on magnetic tape and to send information to the computer's memory, once it has been recorded

H. Mark-sense cards--data is recorded on cards with pencil marks; an optical reader is used to read the data from the cards into the computer's memory or to send it on magnetic tape

I. Microfilm--film which contains a photographic record of material reduced in size

J. Microfilm reader--a device which enlarges microfilm so the reader can read the reduced material

K. OCR--Optical Character Recognition Reader; a device which scans material for data and feeds the data into the computer's memory

L. Printer--a device which provides hard copy of output data from the computer

M. Punched card--a standard computer card which holds data; a keypunch machine is used to punch holes in the card

II. TYPES OF COMPUTERS

Computers vary in size, cost, and computer power (speed to process data and memory capacity). A quick comparison of some computers available and their characteristics will help in understanding the abilities of a microcomputer.

A. Electronic calculator

1. Simplest type of computer
2. Low in cost
3. Limited memory capacity
4. Limited peripheral support

B. Microcomputers

1. Costs range from $300 to $5,000
2. Limited in volume of data it can process
3. Memory capacity can be expanded up to 64K
4. Used to perform specific applications
5. Supports peripheral devices

C. Minicomputers

1. Costs range from $5,000 to $400,000
2. Can process larger volumes of data than a microcomputer
3. Memory capacity can be expanded from 32K to 128K
4. Can perform a variety of functions
5. Supports peripheral devices

D. Mainframe (large-scale) computer

1. Largest, most powerful, and most expensive computer available
2. Can handle large volumes of data and sophisticated problems
3. Memory capacity can be expanded to millions of words
4. Supports peripheral devices

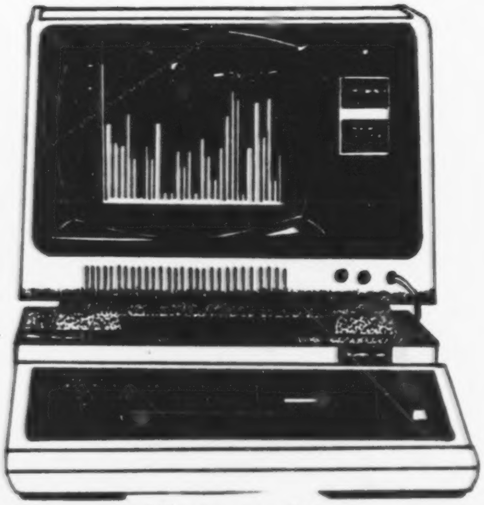
III. FUNCTIONS OF A COMPUTER

The computer is just one part of an information processing system. It is a machine in a group of machines, people, and procedures organized to convert information into a more usable form.

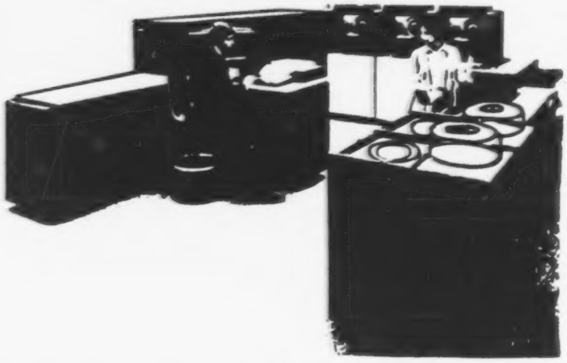
A. To process information and control peripheral equipment

B. To support data input and output activities

C. A tool which helps a person perform certain types of work faster and improve accuracy



Microcomputer



Medium Scale Computer

Large Scale Computer

IV. Parts of a computer

Regardless of size, shape, expense, and levels of ability, every computer has certain basic parts:

A. Central processing unit (CPU)

B. Memory

C. Input/Output system (I/O)

V. Central processing unit--the "brains" of the computer

A. Functions

1. To control the other components of the system.

2. To perform computations and make decisions.

B. Parts of a CPU

1. Control unit

a. Responsible for the automatic and decision-making characteristics of the computer.

b. Retrieves instructions from the memory, interprets instructions, and sends control signals to other parts of the computer based on these instructions or "programs."

2. Arithmetic/Logic Unit (ALU)

a. Carries out most of the operations designated by the computer's instruction set.

b. Performs calculations and makes decisions.

VI. Memory--the part of the computer where information is stored

A. Function

1. Receives data from input devices

2. Stores information until it is needed

B. Two types of memory

1. Read-only memory (ROM)--permanent, unchangeable memory which stores the programs prepared by the manufacturer. Several types of ROM are available on the market today.

2. Random access memory (RAM)--changeable, reusable memory which is used to store the programs and data during a program execution. This memory is temporary and information is lost when the power is turned off.

VII. Input/Output system--the part of the computer which communicates with peripheral devices.

A. Controls communication between the computer and peripheral devices, such as a printer or cassette unit.

B. Enables peripheral devices to be interfaced or connected to the computer.

VIII. Computer Languages

The computer operates under or is controlled by the direction of a program. The sequence of steps to be performed must be translated into detailed instructions the computer understands. Therefore, the programs must be written in a programming (computer) language understood by the computer being used.

A. Types of programming languages

A computer may accept one or all of the following languages:

1. Machine language--the final language used by all computers; is in binary numbers and codes, and requires the programmer to have a working knowledge of the computer's internal components and operations. This language is difficult to learn, time-consuming, and costly.

2. Assembly-language--a symbolic language which uses symbols or mnemonics to code instructions. It is easier to learn than machine language.

   a. Assembler--a program which translates assembly language programs into machine language instructions. Once a program has been written in assembly language, it is entered into the computer whose memory contains an assembler. The assembler converts the program into machine language for execution.

   b. Compiler--a higher level translation program which resides in the memory to convert programs written in a high-level language into machine language.

   c. Interpreter--another form of a higher level translation program. It analyzes the high-level language program and converts it into machine language for execution.

3. Operating system--a set of system programs that can perform many different services the user would normally have to program if such a system were not available.

B. Applications Software

1. Software required by the computer for it to do useful work. (Payroll, accounts receivable, games, word processing).

2. A program or set of programs that perform the functions specified by the user, such as sorting lists, performing calculations, or entering data onto forms.

C. Software Development and Sources

Programs are necessary to control the operations of the computer and to feed data into the computer. There are several alternatives available for providing these programs to operate a computer system:

1. In-house development--writing programs within a firm, utilizing a staff person who is knowledgeable in programming languages, internal components, and operations of the computer, to fit the needs of the operation.

2. Off-the-shelf packages--programs already developed which are available from various sources.

   a. Computer manufacturers--software provided by the manufacturers of computer systems.

   b. Systems houses-- companies which provide all the software for a particular computer.

   c. Software houses--firms that specialize in the development of software.

   d. Other users--software developed by users for their own computers sell the software to help recover the cost of developing the software.

   e. Contracted development--person(s) or firm(s) who are hired by the user to develop specific software.